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# SN
# Distribution Study of Grocery Store Sales
# 1986

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SECTION 1 covers a statistical profile of the top 50 Metropolitan Statistical Areas ranked on the basis of supermarket sales volume. It includes demographics as well as information on leading grocery stores compiled as noted below and on principal suppliers.

SECTION 2 covers information on grocery store business in other market areas throughout the United States. Markets are reported alphabetically by State and City. Included is available information on number of stores and estimated share of the food market accounted for by the chains, voluntary and cooperative groups and independents. It also contains information on principal suppliers.

SECTION 3 contains profiles of leading publicly-owned food chains throughout the country, including: corporate addresses; total number of stores; market areas covered; sales volume; key personnel.

SECTION 4 covers a Grocery Store Statistical Profile--a summary of grocery store business, growth of supermarkets and operating results of leading grocery chains.

SECTION 5 contains a calendar of industry events for 1986 and a directory of food associations.

NOTE: Figures on grocery store numbers and market share are supplied by many newspaper organizations. Data may not be comparable from year to year due to differences in market area definitions or in methods of compilation. Reported sales shares are estimated by reporting sources. Methods of compilation vary, from formal surveys to checks with food representatives, brokers, other local sources or reflecting informed opinion. In some instances, as noted, percentages reflect place of most frequent purchase, as reported by consumers, rather than dollar volume.

This report is presented as a convenient summary of the best available information on grocery store business in each market area. FAIRCHILD BOOK DIVISION assumes no responsibility for the accuracy of figures supplied by reported sources.

# TABLE OF CONTENTS

SECTION 1:

THE TOP 50 METROPOLITAN STATISTICAL AREAS RANKED ON THE BASIS OF SUPERMARKET SALES VOLUME 1984:

| Market Area | Rank by Supermarket Sales 1984 | Page |
|---|---|---|
| Albany-Schenectady-Troy, N.Y. | 45th | 90- 91 |
| Atlanta, Ga. | 13th | 26- 27 |
| Baltimore, Md. | 16th | 32- 33 |
| Birmingham, Ala. | 47th | 94- 95 |
| Boston, Mass. | 10th | 20- 21 |
| Buffalo, N.Y. | 39th | 78- 79 |
| Chicago, Ill. | 3rd | 6- 7 |
| Cincinnati, Ohio-Ky.-Ind. | 30th | 60- 61 |
| Cleveland, Ohio | 22nd | 44- 45 |
| Columbus, Ohio | 32nd | 64- 65 |
| Dallas-Ft. Worth, Texas | 5th | 10- 11 |
| Denver-Boulder, Col. | 14th | 28- 29 |
| Detroit, Mich. | 7th | 14- 15 |
| Ft. Lauderdale-Hollywood, Fla. | 34th | 68- 69 |
| Hartford, Conn. | 36th | 72- 73 |
| Houston, Tex. | 9th | 18- 19 |
| Indianapolis, Ind. | 35th | 70- 71 |
| Kansas City, Mo.-Kans. | 26th | 52- 53 |
| Knoxville, Tenn. | 49th | 98- 99 |
| Las Vegas, Nev. | 50th | 100-101 |
| Los Angeles and Orange Counties, Cal. | 1st | 2- 3 |
| Louisville, Ky.-Ind. | 42nd | 84- 85 |
| Miami, Fla. | 25th | 50- 51 |
| Memphis, Tenn., Ark., Miss. | 41st | 82- 83 |
| Milwaukee, Wis. | 31st | 62- 63 |
| Minneapolis, St. Paul, Minn.-Wis. | 15th | 30- 31 |
| Nashville-Davidson, Tenn. | 43rd | 86- 87 |
| Nassau-Suffolk, N.Y. | 11th | 22- 23 |
| New Orleans, La. | 27th | 54- 55 |
| New York, N.Y. | 2nd | 4- 5 |
| Newark, N.J. | 23rd | 46- 47 |
| Oklahoma City, Okla. | 37th | 74- 75 |
| Orlando, Fla. | 46th | 92- 93 |
| Philadelphia, Pa.-N.J. | 4th | 8- 9 |
| Phoenix, Ariz. | 17th | 34- 35 |
| Pittsburgh, Pa. | 19th | 38- 39 |
| Portland, Ore.-Wash. | 38th | 76- 77 |
| Riverside-San Bernardino-Ontario, Cal. | 24th | 48- 49 |
| Rochester, N.Y. | 40th | 80- 81 |
| Sacramento, Cal. | 29th | 58- 59 |
| St. Louis, Mo.-Ill. | 12th | 24- 25 |
| Salt Lake City-Ogden, Utah | 44th | 88- 89 |
| San Antonio, Texas | 33rd | 66- 67 |
| San Diego, Cal. | 21st | 42- 43 |
| San Francisco, Cal. | 6th | 12- 13 |
| San Jose, Cal. | 28th | 56- 57 |
| Seattle-Everett, Wash. | 20th | 40- 41 |
| Tampa-St. Petersburg, Fla. | 18th | 36- 37 |
| Tulsa, Okla. | 48th | 96- 97 |
| Washington, D.C., Md.-Va. | 8th | 16- 17 |

# TABLE OF CONTENTS (cont'd)

SECTION 2:

OTHER MARKETS, RETAIL GROCERY STORE SALES BY TYPE OF ORGANIZATION ARRANGED BY STATE AND CITY FOLLOWED BY CANADA.......... 103-268

SECTION 3:

PROFILES OF LEADING FOOD CHAINS ARRANGED ALPHABETICALLY BY COMPANY.......... 269-293

SECTION 4:

GROCERY STORE STATISTICAL PROFILE.......... 295-305

Grocery Store Firms by Sales Size, 1982.......... 295
Concentration of Sales Among Largest Grocery Store Firms, 1982.......... 296
Grocery Store Firms, Number of Stores Operated & Sales, 1982.......... 297
Grocery Stores (Individual Stores) by Sales Size, 1982, 1977.......... 298
Grocery Stores With Payroll: Sales by Type of Merchandise, 1982-1977.......... 299
Grocery Stores: Estimated Number of Stores & Sales, 1974-1984:
  All Grocery Stores, Chain Grocery Stores.......... 300
Supermarkets: Estimated Number of Stores & Sales, 1974-1984:.......... 300
Distribution of Grocery Store Sales by Geographic Region.......... 301
Per Capita Sales of Grocery Stores by Geographic Region.......... 301
Percentage of Grocery Store Sales by Months, 1980-1984.......... 302
Distribution of the U.S. Resident Population, Personal Income
  & Supermarket Sales, by State & Region, 1984.......... 303
Consumer Price Index.......... 305

SECTION 5:

ADDITIONAL SUPERMARKET DATA.......... 307-318

Calendar of Industry Events for 1986.......... 308
Directory of Food Associations.......... 313

# INTRODUCTION

The analysis of the 302 metropolitan markets includes the number of store units and market shares held by leading chains, voluntary/cooperative groups and independent grocery stores. Also included are listings of principal suppliers for the leading retailers of these markets. Profiles for the 50 largest markets include statistics on total retail sales, total food store sales and total supermarket sales, as well as demographics on population and the number of households by age and income from The 1985 Sales and Marketing Management Survey of Buying Power and Data Service, further reproduction is forbidden.

Definition of Terms:

SUPERMARKET: A complete, departmentalized grocery store with minimum annual sales of $2,000,000.

CHAIN: A company which operates eleven or more stores in total. A chain store unit is a store operated by such a company.

INDEPENDENT: A firm which operates from one to ten stores.

UNAFFILIATED INDEPENDENT: Operator from one to ten stores having no affiliations with any organization and buying entirely from wholesalers or suppliers on an independent basis.

COOPERATIVE: Independent grocers who jointly own and operate their own wholesale organization.

VOLUNTARY: A group of independent grocery stores jointly sponsored by an independent wholesaler.

CONVENIENCE STORE: A small store handling a limited variety of items in general use in most households and patronized for fill-in home requirements.

ABC CITY ZONE: Comprises the corporate limits of the city in which a newspaper is published. Contiguous areas may be included in the zone to the extent that they have substantially the built-up characteristics of the city and cannot readily be distinguished from the city itself.

RETAIL TRADING ZONE: The area beyond the city zone whose residents regularly trade to an important degree with retail merchants in the city zone.

METROPOLITAN STATISTICAL AREA: Comprises the Standard Metropolitan Statistical Areas as defined by the U.S. Bureau of the Budget.

# THE TOP 50
# STANDARD METROPOLITAN AREAS RANKED ON THE BASIS OF SUPERMARKET SALES VOLUME
# 1984

## 1. LOS ANGELES AND ORANGE COUNTIES, CALIFORNIA

| Market Area Covered: Los Angeles and Orange Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 84.9% | |
| Ralphs | 126 | 17.8 | (Own) Compton, CA |
| Vons | 97 | 16.6 | (Own) El Monte, CA |
| Lucky | 110 | 14.4 | (Own) Buena Park, CA |
| Alpha Beta | 128 | 10.0 | (Own) LaHabra, CA |
| Safeway | 95 | 6.6 | (Own) Downey, CA |
| Hughes Markets | 39 | 6.2 | Cert. Grocers of California, L.A., CA |
| Gemco | 24 | 5.1 | Cert. Grocers of California, L.A., CA |
| Boys Market | 44 | 4.6 | (Own) Fullerton, CA |
| Albertson's | 54 | 3.6 | Cert. Grocers of California, L.A., CA |
| Stater Bros. | 29 | * | (Own) Colton, CA |
| Mayfair | 11 | * | Cert. Grocers of California, L.A., CA |
| The Pantry | 11 | * | (Own) Los Angeles, CA |
| McCoy's | 2 | * | |
| ABC | 7 | * | |
| Fedco | 5 | * | |
| Foods Co. | 10 | * | |
| Gelson's | 6 | * | Cert. Grocers of California, L.A., CA |
| Big D Ranch Markets | 6 | * | |
| Super-A-Foods | 9 | * | |
| JonSons | 5 | * | |
| Westward Ho | 4 | * | |
| Jurgenson's | 6 | * | |
| Phil's | 4 | * | |
| OTHER GROCERY STORES | na | 15.1% | |
| TOTAL | 832+ | 100.0% | |

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* Included in "Other Grocery Stores"
na - not available

Metropolitan Statistical Area:
Los Angeles and Orange Counties

Rank in U.S. based on supermarket sales 1984: 1

| | U.S. | MSA Total | Central City Los Angeles |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 62,286 | $ 18,482 |
| Food Store Sales (millions) | $ 270,831 | $ 12,409 | $ 3,864 |
| % of total retail sales | 20.9% | 19.9% | 20.9% |
| Supermarket Sales (millions) | $ 253,433 | $ 11,429 | $ -- |
| % of Food Store Sales | 93.6% | 92.1% | -- % |
| Total number of Food Stores | 227,219 | 7,836 | 2,658 |
| Supermarket Sales per capita | $1,063.62 | $ 1,141.47 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 10,012.5 | 3,135.3 |
| Total number of Households (thousands) | 86,926.6 | 3,633.5 | 1,198.0 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.1% | -- % |
| 25 - 34 Years | 23.1% | 24.8% | -- % |
| 35 - 44 Years | 19.0% | 20.8% | -- % |
| 45 - 54 Years | 15.0% | 15.7% | -- % |
| 55 - 64 Years | 15.5% | 14.9% | -- % |
| 65 & Over | 20.4% | 16.6% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 26.9% | -- % |
| Two | 30.6% | 30.2% | -- % |
| Three | 17.5% | 16.6% | -- % |
| Four | 15.3% | 14.0% | -- % |
| Five | 7.2% | 6.7% | -- % |
| Six & Over | 4.6% | 5.6% | -- % |
| Average Household Size | 2.74 | 2.78 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 125,147 | $ 37,815 |
| Per Capita EBI | $ 10,813 | $ 13,096 | $ 12,061 |
| Median Household EBI | $ 25,496 | $ 31,899 | $ 24,904 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 13.8% | 18.3% |
| $10,000 - $24,999 | 32.0% | 28.2% | -- % |
| $25,000 & Over | 51.0% | 58.0% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 66.1% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 54.6% | -- % |

## 2. NEW YORK, NEW YORK – NEW JERSEY

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 47.3% | |
| Pathmark | 84 | 12.5 | (Own) Woodbridge, NJ |
| A&P | 193 | 8.8 | (Own) Garden City, NY,<br>Edison & Paterson, NJ |
| Waldbaum's | 110 | 8.0 | (Own) Central Islip, NY |
| Grand Union | 119 | 4.0 | (Own) Elmwood Park, NJ |
| King Kullen | 54 | 3.0 | (Own) Westbury, NY |
| Shopwell | 69 | 3.0 | (Own) Bronx, NY |
| Acme Markets | 45 | 2.0 | (Own) Whippany, NJ |
| Gristede | 15 | 2.0 | (Own) Bronx, NY |
| First National Stores | 20 | 2.0 | (Own) Windsor Locks, CT |
| Sloan's | 35 | 1.0 | Krasdale Foods, Bronx, NY |
| Royal Farms | 20 | 1.0 | White Rose, Farmingdale, NY |
| Scaturro Food Markets | 12 | * | White Rose, Farmingdale, NY |
| Dan's Supreme | 26 | * | White Rose, Farmingdale, NY |
| D'Agostino | 17 | * | Twin County Grocers, Edison, NJ |
| E & B | 19 | * | Krasdale Foods, Bronx, NY |
| Fedco Foods | 27 | * | Krasdale Foods, Bronx, NY |
| Red Apple | 30 | * | Krasdale Foods, Bronx, NY |
| Federation of Coops | 10 | * | Mid-East Coops, Carlstadt, NJ |
| Food Emporium | 13 | * | Shopwell, Bronx, NY |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 26.0% | |
| ShopRite | 60 | 10.0 | (Own) Wakefern Food Corp.,<br>Elizabeth, NJ |
| Foodtown | 140 | 7.5 | (Own) Twin County Grocer Co.,<br>Edison, NJ |
| Key Food | 145 | 4.0 | (Own) Brooklyn, NY |
| Met | 117 | 2.0 | (Own) White Rose Food Corp.,<br>Farmingdale, NY |
| Krasdale C Town | 165 | 1.5 | Krasdale Foods, Bronx, NY |
| Associated | 135 | 1.0 | (Own) Jamaica, NY |
| Pioneer | 16 | * | na |
| OTHER GROCERY STORES | 11,458 | 26.7%** | |
| TOTAL | 13,154 | 100.0% | |

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* Included in "Other Grocery Stores"

**This volume is done by the many small and specialized food stores which make up an important part of the New York food market.

Metropolitan Statistical Area:
NY: Bronx, Kings, New York, Putnam, Queens, Richmond, Rockland, Westchester Counties

Rank in U.S. based on supermarket sales 1984: 2

| | U.S. | MSA Total | Central City New York |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 38,785 | $ 31,132 |
| Food Store Sales (millions) | $ 270,831 | $ 7,816 | $ 6,156 |
| % of total retail sales | 20.9% | 20.2% | 19.8% |
| Supermarket Sales (millions) | $ 253,433 | $ 6,502 | $ 5,054 |
| % of Food Store Sales | 93.6% | 83.2% | 81.2% |
| Total number of Food Stores | 227,219 | 13,154 | 10,992 |
| Supermarket Sales per capita | $1,063.62 | $ 774.87 | $ 705.73 |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 8,391.1 | 7,161.4 |
| Total number of Households (thousands) | 86,926.6 | 3,312.1 | 2,881.3 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 4.7% | 5.0% |
| 25 - 34 Years | 23.1% | 21.9% | 22.6% |
| 35 - 44 Years | 19.0% | 19.5% | 19.5% |
| 45 - 54 Years | 15.0% | 15.6% | 15.3% |
| 55 - 64 Years | 15.5% | 16.0% | 16.0% |
| 65 & Over | 20.4% | 22.2% | 22.6% |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 32.5% | 34.1% |
| Two | 30.6% | 28.3% | 28.6% |
| Three | 17.5% | 15.9% | 15.9% |
| Four | 15.3% | 12.7% | 12.1% |
| Five | 7.2% | 6.2% | 5.9% |
| Six & Over | 4.6% | 4.4% | 4.4% |
| Average Household Size | 2.74 | 2.53 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 98,931 | $ 80,272 |
| Per Capita EBI | $ 10,813 | $ 11,790 | $ 11,209 |
| Median Household EBI | $ 25,496 | $ 25,354 | $ 22,712 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 20.6% | 22.2% |
| $10,000 - $24,999 | 32.0% | 30.6% | 30.6% |
| $25,000 & Over | 51.0% | 48.8% | 47.2% |
| Projected EBI % change 1989/1984 | +65.9% | 54.6% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 49.4% | -- % |

## 3. CHICAGO, ILLINOIS

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 62.0-65.0% | |
| Jewel | 200 | 35.0 | American Stores, Salt Lake City, UT |
| Dominick's | 82 | 19.0 | (Own) Northlake, IL |
| Eagle | 52 | 4.0-5.0 | (Own) Milan, IL |
| Butera | 24 | 3.0 | (Own) Chicago, IL |
| Aldi | 38 | 1.0-3.0 | (Own) Batavia, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 30.0-32.0% | |
| Certified Grocers Midwest | 200 | 22.0 | (Own) Chicago, IL |
| Central Grocers | 50 | 6.0-8.0 | (Own) Franklin Park, IL |
| Cub Foods | 4 | 2.0 | Super Value, Minneapolis, MN |
| Pick 'n Save | 5 | na | Roundy's |
| Super Plus | 5 | na | Certified Grocer's |
| OTHER GROCERY STORES | na | 3.0-8.0% | |
| TOTAL | 660+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Cook, DuPage, McHenry Counties

Rank in U.S. based on supermarket sales 1984: 3

| | U.S. | MSA Total | Central City Chicago |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 33,155 | $ 12,056 |
| Food Store Sales (millions) | $ 270,831 | $ 5,795 | $ 2,366 |
| % of total retail sales | 20.9% | 17.5% | 19.6% |
| Supermarket Sales (millions) | $ 253,433 | $ 5,313 | $ -- |
| % of Food Store Sales | 93.6% | 91.7% | -- % |
| Total number of Food Stores | 227,219 | 3,538 | 2,809 |
| Supermarket Sales per capita | $1,063.62 | $ 877.18 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 6,056.9 | 2,963.5 |
| Total number of Households (thousands) | 86,926.6 | 2,203.6 | 1,102.4 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 5.9% | -- % |
| 25 - 34 Years | 23.1% | 23.7% | -- % |
| 35 - 44 Years | 19.0% | 19.8% | -- % |
| 45 - 54 Years | 15.0% | 15.9% | -- % |
| 55 - 64 Years | 15.5% | 16.4% | -- % |
| 65 & Over | 20.4% | 18.3% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 26.9% | -- % |
| Two | 30.6% | 28.3% | -- % |
| Three | 17.5% | 16.7% | -- % |
| Four | 15.3% | 14.6% | -- % |
| Five | 7.2% | 7.6% | -- % |
| Six & Over | 4.6% | 5.9% | -- % |
| Average Household Size | 2.74 | 2.75 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 75,035 | $ 30,317 |
| Per Capita EBI | $ 10,813 | $ 12,388 | $ 10,230 |
| Median Household EBI | $ 25,496 | $ 30,695 | $ 23,409 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 14.6% | 22.4% |
| $10,000 - $24,999 | 32.0% | 25.4% | -- % |
| $25,000 & Over | 51.0% | 60.0% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 63.3% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 62.4% | -- % |

## 4. PHILADELPHIA, PENNSYLVANIA – NEW JERSEY

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 57.5% | |
| Acme/Super Save | 151 | 31.5 | (Own) Philadelphia, PA |
| Super Fresh | 59 | 14.0 | (Own) Montvale, NJ |
| Pathmark | 35 | 12.0 | (Own) Woodbridge, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 35.2% | |
| Thriftway | 81 | 14.0 | Fleming Foods Co. of Pennsylvania, Oaks, PA |
| Food Lane | 87 | na | Fleming Doods Co. of Pennsylvania, Oaks, PA |
| Pioneer | | | |
| Shopping Cart | | | |
| Pickwell | | | |
| Shop'n Bag | 600 | 10.0 | (Own) Frankford-Quaker, Philadelphia, PA |
| Unity Markets | | | |
| Unity Frankford | | | |
| Quaker | | na | |
| Penn Mutual | | | |
| ShopRite | 28 | 8.0 | Wakefern Food Corp., Elizabeth, NJ |
| IGA | 39 | 3.2 | Wetterau Foods Dist., Temple, PA |
| OTHER GROCERY STORES | 1,500 | 7.3% | |
| TOTAL | 2,580 | 100.0% | |

Metropolitan Statistical Area:
PA: Bucks, Chester, Delaware, Montgomery, Philadelphia Counties
NJ: Burlington, Camden, Glouster Counties

Rank in U.S. based on supermarket sales 1984: 4

| | U.S. | MSA Total | Central City Philadelphia |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 26,175 | $ 7,019 |
| Food Store Sales (millions) | $ 270,831 | $ 5,179 | $ 1,534 |
| % of total retail sales | 20.9% | 19.8% | 21.9% |
| Supermarket Sales (millions) | $ 253,433 | $ 4,637 | $ 1,344 |
| % of Food Store Sales | 93.6% | 89.5% | 87.6% |
| Total number of Food Stores | 227,219 | 4,970 | 2,589 |
| Supermarket Sales per capita | $1,063.62 | $ 972.12 | $ 826.62 |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 4,770.0 | 1,625.9 |
| Total number of Households (thousands) | 86,926.6 | 1,733.8 | 622.0 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 5.1% | 5.4% |
| 25 - 34 Years | 23.1% | 21.4% | 20.1% |
| 35 - 44 Years | 19.0% | 18.8% | 16.4% |
| 45 - 54 Years | 15.0% | 16.4% | 15.0% |
| 55 - 64 Years | 15.5% | 17.8% | 18.0% |
| 65 & Over | 20.4% | 20.6% | 25.0% |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 25.0% | 30.3% |
| Two | 30.6% | 28.7% | 28.0% |
| Three | 17.5% | 17.6% | 16.4% |
| Four | 15.3% | 15.6% | 12.8% |
| Five | 7.2% | 7.9% | 6.8% |
| Six & Over | 4.6% | 5.2% | 5.7% |
| Average Household Size | 2.74 | 2.75 | 2.61 |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 54,976 | $ 15,610 |
| Per Capita EBI | $ 10,813 | $ 11,525 | $ 9,601 |
| Median Household EBI | $ 25,496 | $ 28,146 | $ 21,140 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 15.3% | 24.3% |
| $10,000 - $24,999 | 32.0% | 28.6% | 33.5% |
| $25,000 & Over | 51.0% | 56.1% | 42.2% |
| Projected EBI % change 1989/1984 | +65.9% | 64.0% | 60.9% |
| Projected average household EBI % change 1989/1984 | +55.1% | 58.7% | 64.4% |

## 5. DALLAS – FORT WORTH, TEXAS

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | | Principal Supplier |
|---|---|---|---|---|
| | | Dallas | Ft. Worth | |
| LEADING CHAINS: | | 89.5% | 77.0% | |
| Safeway | 82 | 18.0 | 22.0 | (Own) Dallas, TX |
| Tom Thumb | 41 | 23.0 | 5.0 | A.W. Cullum & Co., Dallas, TX |
| Kroger | 41 | 20.0 | 14.5 | (Own) Irving, TX |
| Minyard Food Stores | 58 | 14.5 | 5.5 | Big Tex, Dallas, TX |
| Skaggs-Alpha Beta | 22 | 11.0 | 13.0 | Wapples Platter, Lubbock, TX |
| Winn-Dixie/Buddies | 15 | 3.0 | 17.0 | Winn-Dixie Texas Inc., Fort Worth, TX |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 6.0% | 10.0% | |
| Affiliated, AG, Thriftee | 125 | 6.0 | 10.0 | Affiliated, Dallas, Texas |
| LEADING INDEPENDENTS: | | 1.1% | | |
| Food Basket | 7 | 0.8 | | na |
| Jewel T's Box Stores | 13 | 0.3 | | na |
| Albertson's | 7 | na | | na |
| OTHER GROCERY STORES | na | 3.4% | 11.9% | |
| TOTAL | 411+ | 100.0% | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Collin, Dallas, Denton, Ellis, Johnson,
Kaufman, Parker, Rockwall, Tarrant, Counties

Rank in U.S. based on supermarket sales 1984: 5

| | | MSA | Central City | |
|---|---|---|---|---|
| | U.S. | Total | Dallas | Ft. Worth |
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 22,810 | $ 7,817 | $ 3,243 |
| Food Store Sales (millions) | $ 270,831 | $ 4,319 | $ 1,261 | $ 556 |
| % of total retail sales | 20.9% | 18.9% | 16.1% | 17.1% |
| Supermarket Sales (millions) | $ 253,433 | $ 4,133 | $ -- | $ -- |
| % of Food Store Sales | 93.6% | 95.7% | -- % | -- % |
| Total number of Food Stores | 227,219 | 2,206* | 817 | 408 |
| Supermarket Sales per capita | $1,063.62 | $ 1,223.00 | $ -- | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 3,379.4 | 972.9 | 417.5 |
| Total number of Households (thousands) | 86,926.6 | 1,239.2 | 391.9 | 158.0 |
| Population by Age of Household Head | | | | |
| Under 25 Years | 7.0% | 9.1% | -- % | -- % |
| 25 - 34 Years | 23.1% | 27.1% | -- % | -- % |
| 35 - 44 Years | 19.0% | 21.5% | -- % | -- % |
| 45 - 54 Years | 15.0% | 14.8% | -- % | -- % |
| 55 - 64 Years | 15.5% | 12.9% | -- % | -- % |
| 65 & Over | 20.4% | 14.6% | -- % | -- % |
| Number of Persons per Household | | | | |
| % by number of persons per household | | | | |
| One | 24.8% | 24.3% | -- % | -- % |
| Two | 30.6% | 30.5% | -- % | -- % |
| Three | 17.5% | 18.3% | -- % | -- % |
| Four | 15.3% | 16.0% | -- % | -- % |
| Five | 7.2% | 6.8% | -- % | -- % |
| Six & Over | 4.6% | 4.1% | -- % | -- % |
| Average Household Size | 2.74 | 2.73 | -- | -- |
| INCOME 1984 | | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 42,451 | $ 12,344 | $ 4,731 |
| Per Capita EBI | $ 10,813 | $ 12,562 | $ 12,688 | 11,332 |
| Median Household EBI | $ 25,496 | $ 29,786 | $ 25,118 | 24,658 |
| Household by EBI Groups | | | | |
| % Distribution | | | | |
| Under $10,000 | 16.9% | 12.6% | 15.9% | 17.2% |
| $10,000 - $24,999 | 32.0% | 28.2% | -- % | -- % |
| $25,000 & Over | 51.0% | 59.2% | -- % | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 82.6% | -- % | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 57.2% | -- % | -- % |

* Does not include Rockwall County.

## 6. SAN FRANCISCO – OAKLAND, CALIFORNIA

| Market Area Covered: San Francisco, San Mateo, Contra Costa, Alameda, Santa Clara, Marin, Sonoma, Napa, Solano Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 67.5% | |
| Safeway | 146 | 32.0 | (Own) Fremont, CA |
| Lucky (includes Gemcos) | 107 | 19.0 | (Own) San Leandro, CA |
| Alpha Beta | 45 | 5.0 | (Own) San Milpitas, CA |
| Cala/QFI | 24 | 4.5 | Fleming Foods, Fremont, CA |
| Fry's | 21 | 4.0 | Fleming Foods, Fremont, CA |
| Nob Hill | 20 | 3.0 | Fleming Foods, Fremont, CA |
| Albertson's | 16 | * | Fleming Foods, Fremont, CA |
| Petrini's Market | 9 | * | Fleming Foods, Fremont, CA |
| Consumer's Co-op | 9 | * | Fleming Foods, Fremont, CA |
| OTHER GROCERY STORES | na | 32.5% | |
| TOTAL | 397+ | 100.0% | |

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na - not available

* Included in "Other Grocery Stores"

Metropolitan Statistical Area:
Alameda, Contra Costa, Marin, San Francisco, San Mateo Counties

Rank in U.S. based on supermarket sales 1984: 6

| | U.S. | MSA Total | Central City<br>San Francisco | Oakland |
|---|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 23,601 | $ 5,795 | $1,962 |
| Food Store Sales (millions) | $ 270,831 | $ 4,605 | $ 922 | $ 394 |
| % of total retail sales | 20.9% | 19.5% | 17.1% | 20.1% |
| Supermarket Sales (millions) | $ 253,433 | $ 4,089 | $ 749 | $ -- |
| % of Food Store Sales | 93.6% | 88.8% | 75.5% | -- % |
| Total number of Food Stores | $ 227,219 | 3,454 | 1,167 | 374 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,201.90 | $ 1,087.71 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 3,402.1 | 688.6 | 353.6 |
| Total number of Households (thousands) | 86,926.6 | 1,364.4 | 305.7 | 150.8 |
| Population by Age of Household Head | | | | |
| Under 25 Years | 7.0% | 6.2% | 5.5% | --% |
| 25 - 34 Years | 23.1% | 25.1% | 26.2% | --% |
| 35 - 44 Years | 19.0% | 20.7% | 17.7% | --% |
| 45 - 54 Years | 15.0% | 14.9% | 13.2% | --% |
| 55 - 64 Years | 15.5% | 15.2% | 14.5% | --% |
| 65 & Over | 20.4% | 17.9% | 22.8% | --% |
| Number of Persons per Household | | | | |
| % by number of persons per household | | | | |
| One | 24.8% | 31.2% | 42.1% | --% |
| Two | 30.6% | 31.5% | 30.2% | --% |
| Three | 17.5% | 15.9% | 12.3% | --% |
| Four | 15.3% | 12.7% | 8.0% | --% |
| Five | 7.2% | 5.4% | 3.9% | --% |
| Six & Over | 4.6% | 3.4% | 3.6% | --% |
| Average Household Size | 2.74 | 2.49 | 2.25 | -- |
| INCOME 1984 | | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 49,070 | $ 9,861 | $ 4,149 |
| Per Capita EBI | $ 10,813 | $ 14,508 | $ 14,320 | 11,734 |
| Median Household EBI | $ 25,496 | $ 31,722 | $ 26,238 | 22,227 |
| Household by EBI Groups | | | | |
| % Distribution | | | | |
| Under $10,000 | 16.9% | 13.0% | 17.3% | 23.3% |
| $10,000 - $24,999 | 32.0% | 25.6% | -- % | -- % |
| $25,000 & Over | 51.0% | 61.4% | -- % | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 65.0% | -- % | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 54.4% | -- % | -- % |

## 7. DETROIT, MICHIGAN

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 50.5% | |
| Farmer Jack | 83 | 19.0 | (Own) Borman's, Detroit, MI |
| A&P | 35 | 9.5 | (Own) Detroit, MI |
| Kroger | 45 | 9.0 | (Own) Livonia, MI |
| Chatham | 33 | 7.0 | (Own) Warren, MI |
| Great Scot | 19 | 4.0 | (Own) Abner A. Wolf, Div. Allied Supermarkets, Livonia, MI |
| 7-Eleven (C) | 140 | 1.0 | Grosse Pointe Quality Foods, Detroit, MI |
| Lawson's Party Food (C) | 45 | 0.5 | (Own) Akron, OH |
| Quik Pik Food Stores (C) | 58 | 0.5 | Abner Wolf Co., Detorit, MI |
| LEADING INDEPENDENTS: | | 2.7% | |
| Hollywood | 5 | 1.0 | Grosse Pointe Quality Foods, Detroit, MI |
| Danny's | 10 | 1.0 | Abner Wolf Co., Detroit, MI |
| Shopping Center | 3 | 0.7 | Hiller & Lutey, Inc., Southfield, MI |
| OTHER GROCERY STORES | na | 46.8% | |
| TOTAL | 476+ | 100.0% | |

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(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
Lapeer, Livingston, Macomb, Monroe, Oakland, St. Clair, Wayne Counties

Rank in U.S. based on supermarket sales 1984: 7

| | U.S. | MSA Total | Central City Detroit |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 23,480 | $ 3,367 |
| Food Store Sales (millions) | $ 270,831 | $ 4,495 | $ 802 |
| % of total retail sales | 20.9% | 19.1% | 23.8% |
| Supermarket Sales (millions) | $ 253,433 | $ 4,041 | $ -- |
| % of Food Store Sales | 93.6% | 89.9% | -- % |
| Total number of Food Stores | 227,219 | 3,635 | 1,348 |
| Supermarket Sales per capita | $ 1,063.62 | $ 926.96 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 4,359.4% | 1,080.9 |
| Total number of Households (thousands) | 86,926.6 | 1,576.7 | 408.4 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 6.2% | -- % |
| 25 - 34 Years | 23.1% | 23.7% | -- % |
| 35 - 44 Years | 19.0% | 19.7% | -- % |
| 45 - 54 Years | 15.0% | 16.3% | -- % |
| 55 - 64 Years | 15.5% | 16.6% | -- % |
| 65 & Over | 20.4% | 17.5% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 23.7% | -- % |
| Two | 30.6% | 28.4% | -- % |
| Three | 17.5% | 17.9% | -- % |
| Four | 15.3% | 16.4% | -- % |
| Five | 7.2% | 8.3% | -- % |
| Six & Over | 4.6% | 5.4% | -- % |
| Average Household Size | 2.74 | 2.76 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 49,779 | $ 9,370 |
| Per Capita EBI | $ 10,813 | $ 11,419 | $ 8,670 |
| Median Household EBI | $ 25,496 | $ 29,170 | $ 19,585 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 15.2% | 27.5% |
| $10,000 - $24,999 | 32.0% | 26.6% | -- % |
| $25,000 & Over | 51.0% | 58.3% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 55.3% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 53.6% | -- % |

## 8. WASHINGTON, D.C. – MARYLAND – VIRGINIA

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 82.4% | |
| Giant Food | 96 | 40.0 | (Own) Landover, MD |
| Safeway | 128 | 34.0 | (Own) Landover, MD |
| Food-A-Rama | 10 | 4.4 | Baltimore, MD |
| A&P | 19 | 4.0 | (Own) Baltimore, MD |
| 7-Eleven (C) | 400 | * | (Own) Falmouth, VA |
| High's Dairy Stores (C) | 224 | * | Creasy, Hagerstown, MD |
| LEADING INDEPENDENTS: | | 17.7% | |
| Government Commissaries* | 8 | 6.0 | na |
| Magruder's | 9 | 3.0 | Richfood, Richmond, VA |
| Jumbo Food Stores | 12 | 3.0 | B. Green & Co., Baltimore, MD |
| Cook's Supermarkets | 12 | 2.8 | Richfood, Richmond, VA |
| Food Town/Price Chopper | 9 | 1.8 | B. Green & Co., Baltimore, MD |
| Fresh Value | 3 | 0.6 | Richfood, Richmond, VA |
| Pershing Markets | 3 | 0.5 | Richfood, Richmond, VA |
| OTHER GROCERY STORES | na | 2.9% | |
| TOTAL | 933+ | 100.0% | |

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* Included in "Other Grocery Stores"
na - not available
(C) Convenience Stores

Metropolitan Statistical Area:
D.C., MD: Calvert, Charles, Frederick, Montgomery, Prince George Counties
VA: Alexandria City, Fairfax City, Falls Church City, Manassas City,
Manassas Park, Arlington, Fairfax, Loudoun, Prince William, Stafford Counties

Rank in U.S. based on supermarket sales 1984: 8

| | U.S. | MSA Total | Central City Washington D.C. |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 22,858 | $ 3,024 |
| Food Store Sales (millions) | $ 270,831 | $ 4,302 | $ 520 |
| % of total retail sales | 20.9% | 18.8% | 17.2% |
| Supermarket Sales (millions) | $ 253,433 | $ 3,988 | $ 472 |
| % of Food Store Sales | 93.6% | 92.7% | 90.8% |
| Total number of Food Stores | 227,219 | * 1,565 | 562 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,164.07 | $ 763.63 |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 3,425.9 | 618.1 |
| Total number of Households (thousands) | 86,926.6 | 1,261.6 | 250.1 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 5.9% | 5.8% |
| 25 - 34 Years | 23.1% | 27.3% | 25.9% |
| 35 - 44 Years | 19.0% | 24.0% | 19.4% |
| 45 - 54 Years | 15.0% | 16.1% | 14.4% |
| 55 - 64 Years | 15.5% | 14.0% | 15.5% |
| 65 & Over | 20.4% | 12.7% | 19.0% |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 27.0% | 40.3% |
| Two | 30.6% | 28.0% | 25.7% |
| Three | 17.5% | 18.0% | 13.7% |
| Four | 15.3% | 15.7% | 9.8% |
| Five | 7.2% | 7.0% | 5.1% |
| Six & Over | 4.6% | 4.3% | 5.5% |
| Average Household Size | 2.74 | 2.72 | 2.47 |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 50,511 | $ 8,762 |
| Per Capita EBI | $ 10,813 | $ 14,744 | $ 14,176 |
| Median Household EBI | $ 25,496 | $ 36,002 | $ 27,825 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 8.4% | 16.2% |
| $10,000 - $24,999 | 32.0% | 22.2% | 28.5% |
| $25,000 & Over | 51.0% | 69.3% | 55.3% |
| Projected EBI % change 1989/1984 | +65.9% | 69.5% | 55.1% |
| Projected average household EBI % change 1989/1984 | +55.1% | 58.4% | 58.0% |

*Does not include Calvert, Fairfax City, Falls Church, Manassas City, Manassas Park, or Stafford Counties.

## 9. HOUSTON, TEXAS

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 75.0% | |
| Kroger | 54 | 22.0 | (Own) Houston, TX |
| Randall's | 37 | 17.0 | Fleming Foods, Houston, TX |
| Safeway** | 109 | 16.0 | (Own) Houston, TX |
| Fiesta Mart | 12 | 8.5 | (Own) Houston, TX |
| Rice | 38 | 6.0 | Grocer Supply, Houston, TX |
| Gerland | 17 | 5.5 | Fleming Foods/Grocer Supply, Houston, TX |
| Minimax | 25 | * | Fleming Foods, Houston, TX |
| U-Tote-M/Circle K Stores (C) | 233 | * | Grocer Supply, Houston, TX |
| 7-Eleven (C) | 387 | * | (Own) Dallas, TX |
| Food City | 7 | * | Schepps Wholesale, Houston, TX |
| Lucky 7 | 57 | * | Grocer Supply, Houston, TX |
| Food Giant | 5 | * | Fleming Foods, Houston, TX |
| Clayton's | 3 | * | Grocer Supply, Houston, TX |
| Stop & Go (C) | 300 | * | na |
| Baby Giant (C) | 8 | * | na |
| M&M Foods | 3 | * | Grocer Supply, Houston, TX |
| Sunny's National (C) | 10 | * | na |
| King Saver | 5 | * | Affiliated Foods, Keller, TX |
| OTHER GROCERY STORES | 2,106 | 25.0% | |
| TOTAL | 3,416 | 100.0% | |

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(C) Convenience Stores
na - not available
* Included in "Other Grocery Stores"
** Safeway's flat performance attributes to the acquisition of 43 Weingarten stores.

Metropolitan Statistical Area:
Ft. Bend, Harris, Liberty, Montgomery, Waller Counties

Rank in U.S. based on supermarket sales 1984: 9

| | U.S. | MSA Total | Central City Houston |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 20,891 | $ 14,122 |
| Food Store Sales (millions) | $ 270,831 | $ 4,177 | $ 2,619 |
| % of total retail sales | 20.9% | 20.0% | 18.5% |
| Supermarket Sales (millions) | $ 253,433 | $ 3,984 | $ -- |
| % of Food Store Sales | 93.6% | 95.4% | -- % |
| Total number of Food Stores | 227,219 | 2,605 | 1,683 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,254.09 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 3,176.8 | 1,723.6 |
| Total number of Households (thousands) | 86,926.6 | 1,141.6 | 661.3 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 9.6% | -- % |
| 25 - 34 Years | 23.1% | 30.8% | -- % |
| 35 - 44 Years | 19.0% | 22.1% | -- % |
| 45 - 54 Years | 15.0% | 14.7% | -- % |
| 55 - 64 Years | 15.5% | 11.7% | -- % |
| 65 & Over | 20.4% | 11.2% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 24.9% | -- % |
| Two | 30.6% | 28.5% | -- % |
| Three | 17.5% | 18.1% | -- % |
| Four | 15.3% | 16.1% | -- % |
| Five | 7.2% | 7.3% | -- % |
| Six & Over | 4.6% | 5.1% | -- % |
| Average Household Size | 2.74 | 2.78 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 39,853 | $ 21,374 |
| Per Capita EBI | $ 10,813 | $ 12,545 | $ 12,401 |
| Median Household EBI | $ 25,496 | $ 31,012 | $ 27,487 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 12.1% | 14.0% |
| $10,000 - $24,999 | 32.0% | 26.5% | -- % |
| $25,000 & Over | 51.0% | 61.4% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 65.8% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 48.2% | -- % |

## 10. BOSTON, MASSACHUSETTS

| Market Area Covered: Essex, Middlesex, Norfolk Plymouth & Suffolk Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 71.3% | |
| Purity Supreme/Heartland | 30 | 16.2 | (Own) N. Billerica, MA |
| Stop & Shop | 38 | 16.1 | (Own) Boston, MA |
| Star Market Co. | 32 | 12.3 | (Own) Norwood, MA |
| Shaw's | 9 | 5.1 | (Own) E. Bridgewater, MA |
| DeMoulas | 7 | 4.9 | (Own) Tewksbury, MA |
| Roche Bros. | 6 | 3.8 | Sweet Life Foods, Northboro, MA |
| Johnny's Foodmaster | 8 | 3.0 | Sweet Life Foods, Northboro, MA |
| Angelo's | 7 | 2.9 | (Own) Rockland, MA |
| First National | 4 | 2.0 | (Own) Windsor Locks, CT |
| Cerretani's | 4 | 2.0 | Cressey Dockham, Andover, MA |
| Harvest Markets | 6 | 1.0 | Sweet Life Foods, Northboro, MA |
| Victory Markets | 4 | 1.0 | Sweet Life Foods, Northboro, MA |
| Flanagan's Markets | 5 | 1.0 | Sweet Life Foods, Northboro, MA |
| OTHER GROCERY STORES | na | 28.7% | |
| TOTAL | 160+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Essex, Middlesex, Norfolk, Plymouth, Suffolk Counties

Rank in U.S. based on supermarket sales 1984: 10

| | U.S. | MSA Total | Central City Boston |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 25,285 | $ 3,798 |
| Food Store Sales (millions) | $ 270,831 | $ 4,417 | $ 641 |
| % of total retail sales | 20.9% | 17.5% | 16.9% |
| Supermarket Sales (millions) | $ 253,433 | $ 3,888 | $ -- |
| % of Food Store Sales | 93.6% | 88.0% | -- % |
| Total number of Food Stores | 227,219 | 3,077 | 605 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,056.98 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 3,678.4% | 547.3 |
| Total number of Households (thousands) | 86,926.6 | 1,357.5 | 220.8 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 5.6% | -- % |
| 25 - 34 Years | 23.1% | 23.0% | -- % |
| 35 - 44 Years | 19.0% | 18.6% | -- % |
| 45 - 54 Years | 15.0% | 15.3% | -- % |
| 55 - 64 Years | 15.5% | 16.0% | -- % |
| 65 & Over | 20.4% | 21.5% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 27.2% | -- % |
| Two | 30.6% | 28.9% | -- % |
| Three | 17.5% | 16.5% | -- % |
| Four | 15.3% | 14.7% | -- % |
| Five | 7.2% | 7.7% | -- % |
| Six & Over | 4.6% | 5.0% | -- % |
| Average Household Size | 2.74 | 2.71 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 48,208 | $ 6,305 |
| Per Capita EBI | $ 10,813 | $ 13,106 | $ 11,520 |
| Median Household EBI | $ 25,496 | $ 31,626 | $ 22,883 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 13.0% | 21.1% |
| $10,000 - $24,999 | 32.0% | 25.5% | -- % |
| $25,000 & Over | 51.0% | 61.6% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 60.2% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 55.9% | -- % |

## 11. NASSAU – SUFFOLK, NEW YORK

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 72.1% | |
| Waldbaum's | 43 | 20.0 | (Own) Central Islip, NY |
| King Kullen | 46 | 15.0 | (Own) Westbury, NY |
| Pathmark | 24 | 14.5 | (Own) Woodbridge, NJ |
| A&P | 24 | 7.0 | (Own) Garden City, NY |
| Grand Union | 17 | 5.0 | (Own) Garden City, NY |
| First National | 6 | 3.0 | (Own) Windsor Locks, CT |
| Gristede | 14 | 2.0 | (Own) Bronx, NY |
| Shopwell | 9 | 2.0 | (Own) Bronx, NY |
| 7-Eleven (C) | 96 | 1.5 | Gristede Bros., Bronx, NY |
| Dan's Supreme | 5 | 1.0 | White Rose Foods, Farmingdale, NY |
| Dairy Barns (C) | 53 | 0.7 | (Own) East Northport, NY |
| Farmette Dairy Stores (C) | 14 | 0.2 | (Own) North Bellmore, NY |
| Royal Farms | 1 | 0.2 | White Rose Foods, Farmingdale, NY |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 23.0% | |
| Foodtown | 20 | 10.0 | (Own) Twin County Grocer, Edison, NJ |
| Shop Rite | 10 | 8.0 | Wakefern Food Corp., Elizabeth, NJ |
| Key Foods | 23 | 3.0 | (Own) Brooklyn, NY |
| IGA | 9 | 2.0 | Bozzuto's, Cheshire, CT |
| OTHER GROCERY STORES | na | 4.9% | |
| TOTAL | 414+ | 100.0% | |

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(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
Nassau, Suffolk Counties

Rank in U.S. based on supermarket sales 1984: 11

| | U.S. | MSA Total | Central City Nassau/Suffolk |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 18,013 | $ -- |
| Food Store Sales (millions) | $ 270,831 | $ 3,671 | $ -- |
| % of total retail sales | 20.9% | 20.4% | -- % |
| Supermarket Sales (millions) | $ 253,433 | $ 3,136 | $ -- |
| % of Food Store Sales | 93.6% | 85.4% | -- % |
| Total number of Food Stores | 227,219 | 2,960 | -- |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,167.40 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 2,686.3 | -- |
| Total number of Households (thousands) | 86,926.6 | 862.3 | -- |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 2.5% | -- % |
| 25 - 34 Years | 23.1% | 19.2% | -- % |
| 35 - 44 Years | 19.0% | 22.2% | -- % |
| 45 - 54 Years | 15.0% | 20.0% | -- % |
| 55 - 64 Years | 15.5% | 19.0% | -- % |
| 65 & Over | 20.4% | 17.1% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 15.5% | -- % |
| Two | 30.6% | 27.2% | -- % |
| Three | 17.5% | 19.3% | -- % |
| Four | 15.3% | 20.6% | -- % |
| Five | 7.2% | 10.9% | -- % |
| Six & Over | 4.6% | 6.6% | -- % |
| Average Household Size | 2.74 | 3.12 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 38,468 | $ -- |
| Per Capita EBI | $ 10,813 | $ 14,320 | $ -- |
| Median Household EBI | $ 25,496 | $ 41,279 | $ -- |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 6.7% | -- % |
| $10,000 - $24,999 | 32.0% | 17.6% | -- % |
| $25,000 & Over | 51.0% | 75.7% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 65.8% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 56.9% | -- % |

## 12. ST. LOUIS, MISSOURI – ILLINOIS

| Market Area Covered:<br>Monroe County, IL.; Franklin, Jefferson, St. Charles, St. Louis, St. Louis City, MO. | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 64.0% | |
| Schnucks* | 53 | 27.0 | (Own) Bridgeton, MO |
| Kroger | 37 | 19.0 | (Own) Hazelwood, MO |
| National Food | 28 | 18.0 | Nat'l. Tea, Vinita Park, MO |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 28.0% | |
| Associated Grocers | 107 | 7.0 | (Own) Hazelwood, MO |
| Tom Boy | 52 | 5.5 | (Own) St. Louis, MO |
| Wetterau** | 45 | 15.5 | (Own) Hazelwood, MO |
| LEADING INDEPENDENTS: | | 5.5% | |
| Dierberg's | 8 | 5.5 | J.M. Jones, Champaign, IL |
| OTHER GROCERY STORES | na | 2.5% | |
| TOTAL | 330+ | 100.0% | |

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na - not available

* Includes conventional Schnucks Market, Super Centers, Super Saver and Rock Bottom.

**Includes Shop 'n Save, Fresh Encounter, IGA, and non-associated stores.

Metropolitan Statistical Area:
MO: St. Louis City, Franklin, Jefferson, St. Charles, St. Louis Counties
IL: Clinton, Jersey, Madison, Monroe, St. Clair Counties

Rank in U.S. based on supermarket sales 1984: 12

| | U.S. | MSA Total | Central City St. Louis |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 14,301 | $ 2,465 |
| Food Store Sales (millions) | $ 270,831 | $ 3,003 | $ 577 |
| % of total retail sales | 20.9% | 21.0% | 23.4% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,799 | $ 529 |
| % of Food Store Sales | 93.6% | 93.2% | 91.7% |
| Total number of Food Stores | 227,219 | *1,323 | 792 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,166.78 | $ 1,226.24 |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 2,398.9 | 431.4 |
| Total number of Households (thousands) | 86,926.6 | 866.4 | 171.2 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 6.2% | 6.5% |
| 25 - 34 Years | 23.1% | 22.4% | 18.9% |
| 35 - 44 Years | 19.0% | 18.9% | 13.2% |
| 45 - 54 Years | 15.0% | 15.8% | 13.4% |
| 55 - 64 Years | 15.5% | 15.8% | 16.9% |
| 65 & Over | 20.4% | 20.9% | 31.5% |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 24.9% | 36.8% |
| Two | 30.6% | 29.6% | 28.4% |
| Three | 17.5% | 17.7% | 13.7% |
| Four | 15.3% | 15.5% | 9.8% |
| Five | 7.2% | 7.3% | 5.2% |
| Six & Over | 4.6% | 4.9% | 6.1% |
| Average Household Size | 2.74 | 2.77 | 2.52 |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 27,412 | $ 3,992 |
| Per Capita EBI | $ 10,813 | $ 11,427 | $ 9,254 |
| Median Household EBI | $ 25,496 | $ 28,404 | $ 18,940 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 14.5% | 25.9% |
| $10,000 - $24,999 | 32.0% | 28.7% | 37.1% |
| $25,000 & Over | 51.0% | 56.8% | 37.0% |
| Projected EBI % change 1989/1984 | +65.9% | 61.9% | 55.3% |
| Projected average household EBI % change 1989/1984 | +55.1% | 58.6% | 62.6% |

* Does not include St. Louis City or Monroe Counties.

## 13. ATLANTA, GEORGIA

Market Area Covered:
Barrow, Butts, Cherokee, Clayton
Cobb, Coweta, Dekalb, Douglas,
Fayette, Forsyth, Fulton,
Gwinnett, Henry, Newton, Paulding
Rockdale, Palding and Walton Counties

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Kroger/Food Giant, Inc. | 49 | 26.9 | (Own) East Point, GA |
| Food Giant | 65 | 20.1 | Super Valu, Atlanta, GA. |
| Big Apple Food Whse. | 17 | | |
| Cub Foods** | 2 | | |
| Big Star (Grand Union) | 46 | 15.4 | (Own) East Point, GA |
| Winn-Dixie | 61 | 11.5 | (Own) Atlanta, GA |
| A&P | 21 | 10.5 | (Own) Atlanta, GA |
| Associated Grocers: | | | |
| Big Buy | 4 | 6.6 | (Own) College Park |
| Thriftown | 24 | | |
| LEADING CONVENINECE STORE CHAINS: | | | |
| Food Mart | 12 | * | na |
| Majik Markets (Munford Inc.) | 113 | * | Atlanta, GA |
| 7-Eleven (Southland Corp.) | 37 | * | Atlanta, GA |
| Tenneco | 28 | * | Atlanta, GA |
| Stop 'N Go | 25 | * | College Park, GA |
| Mr. B's Food Mart | 36 | * | na |
| Starvin' Marvin | 34 | * | na |
| Little General (Circle K) | 15 | * | na |
| Major Oil Co. Service Station Mini Marts*** | 150+ | * | na |
| INDEPENDENT & OTHER GROCERY STORES | 250+ | 9.0% | |
| TOTAL | 989+ | 100.0% | |

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na - not available
* Included in "Other Grocery Stores"
** These percentages are included in Independent & Other Food Stores
***Major Oil Co.'s such as Amoco, Citgo, Gulf, Tenneco, etc. that operate food stores at the service station locations.

Metropolitan Statistical Area:
Barrow, Butts, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth
Fulton, Gwinnett, Henry, Newton, Paulding, Rockdale, Spalding, Walton Counties

Rank in U.S. based on supermarket sales 1984: 13

|  | U.S. | MSA Total | Central City Atlanta |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 15,274 | $ 3,202 |
| Food Store Sales (millions) | $ 270,831 | $ 2,674 | $ 432 |
| % of total retail sales | 20.9% | 17.5% | 13.5% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,538 | $ -- |
| % of Food Store Sales | 93.6% | 94.9% | -- % |
| Total number of Food Stores | 227,219 | *1,940 | 403 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,060.68 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 2,392.8 | 424.4 |
| Total number of Households (thousands) | 86,926.6 | 870.0 | 160.7 |
| Population by Age of Household Head |  |  |  |
| Under 25 Years | 7.0% | 7.2% | -- % |
| 25 - 34 Years | 23.1% | 28.2% | -- % |
| 35 - 44 Years | 19.0% | 23.2% | -- % |
| 45 - 54 Years | 15.0% | 15.0% | -- % |
| 55 - 64 Years | 15.5% | 12.7% | -- % |
| 65 & Over | 20.4% | 13.6% | -- % |
| Number of Persons per Household |  |  |  |
| % by number of persons per household |  |  |  |
| One | 24.8% | 22.7% | -- % |
| Two | 30.6% | 29.4% | -- % |
| Three | 17.5% | 19.5% | -- % |
| Four | 15.3% | 17.1% | -- % |
| Five | 7.2% | 7.2% | -- % |
| Six & Over | 4.6% | 4.1% | -- % |
| Average Household Size | 2.74 | 2.75 | -- |
| INCOME 1984 |  |  |  |
| Net Effective Buying Income (millions) | $2,576,533 | $ 28,039 | $ 4,386 |
| Per Capita EBI | $ 10,813 | $ 11,718 | $ 10,335 |
| Median Household EBI | $ 25,496 | $ 28,610 | $ 19,239 |
| Household by EBI Groups |  |  |  |
| % Distribution |  |  |  |
| Under $10,000 | 16.9% | 14.2% | 8.6% |
| $10,000 - $24,999 | 32.0% | 28.7% | -- % |
| $25,000 & Over | 51.0% | 57.1% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 77.5% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 56.4% | -- % |

* Does not include Butts County.

## 14. DENVER – BOULDER, COLORADO

### DENVER

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 95.0% | |
| King Soopers (Dillon) | 66 | 43.0 | (Own) Denver, CO |
| Safeway | 258 | 41.0 | (Own) Denver, CO |
| Albertson's | 49 | 11.0 | (Own) Denver, CO |
| Friendly Markets | 3 | * | (Own) Denver, CO |
| 7-Eleven (C) (Southland Corp.) | 113 | * | McLane Western, Denver, CO |
| PDQ (C) | 8 | * | na |
| Tenneco (C) | 13 | * | na |
| U-Tote-M (C) | 26 | * | Associated Grocers, Denver, CO |
| Shop 'n Go (National Convenience) | 19 | * | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Associated Grocers | 70 | * | (Own) Assoc. Grocers, Denver, CO |
| AG Super Food | 8 | * | Assoc. Grocers, Denver, CO |
| Associated Food Market | 3 | * | Assoc. Grocers, Denver, CO |
| LEADING INDEPENDENTS: | | | |
| Colo. Soupers | 6 | * | Western Grocers, Denver, CO |
| Shoppin' Save | 3 | * | Assoc. Grocers, Denver, CO |
| Sax Foods | 2 | * | Assoc. Grocers, Denver, CO |
| Nobel Marts | 4 | * | (Own) Denver, CO |
| OTHER GROCERY STORES | na | 5.0% | |
| TOTAL | 651+ | 100.0% | |

### BOULDER

Market Area Covered:
ABC City Zone/Boulder County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 89.0% | |
| 7-Eleven (C) | 7 | * | McLane Western, Denver, CO |
| King Soopers | 3 | 45.0 | (Own) Denver, CO |
| Safeway | 2 | 31.0 | (Own) Denver, CO |
| Albertson's | 2 | 13.0 | McLane Western, Denver, CO |
| Duffy's IGA | 1 | * | na |
| LEADING INDEPENDENTS: | | | |
| Ideal | 1 | * | Assoc. Grocers, Denver, CO |
| Ray's | 1 | * | Meats Only-Swifts, Denver, CO |
| Bova's Pantry | 1 | * | Assoc. Grocers, Denver, CO |
| Steele's | 1 | * | Assoc. Grocers, Denver, CO |
| Cornucopia | 1 | * | Assoc. Grocers, Denver, CO |
| Country Store | 1 | * | Assoc. Grocers, Denver, CO |
| Alfelfa's Pearl St. Market | 2 | * | Assoc. Grocers, Denver, CO |
| OTHER GROCERY STORES | na | 11.0% | |
| TOTAL | 23+ | 100.0% | |

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(C) Convenience Stores
na - not available
* Included in "Other Grocery Stores"

Metropolitan Statistical Area:
Adams, Arapahoe, Boulder, Denver, Douglas, Jefferson Counties

Rank in U.S. based on supermarket sales 1984: 14

| | U.S. | MSA Total | Central City Denver |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 12,398 | $ 3,540 |
| Food Store Sales (millions) | $ 270,831 | $ 2,596 | $ 666 |
| % of total retail sales | 20.9% | 20.9% | 18.8% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,485 | $ 623 |
| % of Food Store Sales | 93.6% | 95.7% | 93.5% |
| Total number of Food Stores | 227,219 | 1,064 | 365 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,362.53 | $ 1,264.72 |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,823.8 | 492.6 |
| Total number of Households (thousands) | 86,926.6 | 721.0 | 222.6 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 9.0% | 9.5% |
| 25 - 34 Years | 23.1% | 30.2% | 29.4% |
| 35 - 44 Years | 19.0% | 21.4% | 15.4% |
| 45 - 54 Years | 15.0% | 14.3% | 11.9% |
| 55 - 64 Years | 15.5% | 12.3% | 13.6% |
| 65 & Over | 20.4% | 12.9% | 20.2% |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 28.9% | 39.9% |
| Two | 30.6% | 30.0% | 30.8% |
| Three | 17.5% | 17.2% | 13.2% |
| Four | 15.3% | 14.8% | 9.2% |
| Five | 7.2% | 6.2% | 4.1% |
| Six & Over | 4.6% | 3.0% | 2.7% |
| Average Household Size | 2.74 | 2.53 | 2.21 |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 23,930 | $ 9,801 |
| Per Capita EBI | $ 10,813 | $ 13,121 | $ 12,540 |
| Median Household EBI | $ 25,496 | $ 29,800 | $ 23,063 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 11.7% | 18.7% |
| $10,000 - $24,999 | 32.0% | 28.6% | 35.7% |
| $25,000 & Over | 51.0% | 59.7% | 45.7% |
| Projected EBI % change 1989/1984 | +65.9% | 80.1% | 58.6% |
| Projected average household EBI % change 1989/1984 | +55.1% | 56.2% | 55.5% |

## 15. MINNEAPOLIS – ST. PAUL, MINNESOTA – WISCONSIN

| Market Area Covered: Anoka, Carver, Chisago, Dakota Dakota, Hennepin, Isanti, Ramsey, Scott, Washington, Wright and St. Croix, WI | No. of Stores | % of Market's Grocery Store Sales* | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 61.0% | |
| Cub | 8 | 20.0 | Super Valu, Hopkins, MN |
| Country Stores | 14 | 10.0 | Red Owl, Hopkins, MN |
| Country Club | 45 | 10.0 | Gateway Foods, Minneapolis, MN |
| Rainbow | 15 | 16.0 | Gateway Foods, Minneapolis, MN |
| Red Owl | 11 | 5.0 | (Own) Hopkins, MN |
| LEADING CONVENIENCE STORE CHAINS: | | 0.9% | |
| Tom Thumb | 89 | 0.7 | Hancock Nelson, St. Paul, MN |
| Kenny's | 25 | 0.2 | Hancock Nelson, St. Paul, MN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 21.0% | |
| Super Value | 57 | 16.0 | Hopkins, MN |
| IGA | 23 | 4.0 | Gateway Foods, Minneapolis, MN |
| County Markets | 10 | 1.0 | Super Valu, Hopkins, MN |
| LEADING INDEPENDENTS: | | 12.0% | |
| Byerly's | 6 | 5.0 | Super Valu, Hopkins, MN |
| Holiday | 4 | 3.0 | Fairway Foods, St. Paul, MN |
| Lunds | 6 | 4.0 | Gateway Foods, Minneapolis, MN |
| OTHER GROCERY STORES | na | 6.1% | |
| TOTAL | 313+ | 100.0% | |

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na - not available

* Data represent percent of consumers who do most of their total food shopping at given group of stores; based on a random telephone sample of 2,508 adults in the Minneapolis-St. Paul Metropolitan area conducted between June 21, and July 18, 1985, plus a mail follow-up questionnaire returned by 1974 of the telephone respondents.

Metropolitan Statistical Area:
MN: Anoka, Carver, Chisago, Dakota, Hennepin, Isanti, Ramsey, Scott, Washington, Wright Counties
WI: St. Croix County

Rank in U.S. based on supermarket sales 1984: 15

| | | MSA | Central City | |
|---|---|---|---|---|
| | U.S. | Total | Minneapolis | St. Paul |
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 14,868 | $ 2,271 | $ 1,872 |
| Food Store Sales (millions) | $ 270,831 | $ 2,626 | $ 403 | $ 329 |
| % of total retail sales | 20.9% | 17.7% | 17.7% | 17.6% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,466 | $ -- | $ -- |
| % of Food Store Sales | 93.6% | 93.9% | -- | -- |
| Total number of Food Stores | 227,219 | 1,373 | 320 | 220 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,111.81 | $ -- | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 2,218.0 | 356.8 | 265.7 |
| Total number of Households (thousands) | 86,926.6 | 827.7 | 163.4 | 109.4 |
| Population by Age of Household Head | | | | |
| Under 25 Years | 7.0% | 8.4% | -- % | --% |
| 25 - 34 Years | 23.1% | 27.4% | -- % | --% |
| 35 - 44 Years | 19.0% | 20.3% | -- % | --% |
| 45 - 54 Years | 15.0% | 14.0% | -- % | --% |
| 55 - 64 Years | 15.5% | 13.1% | -- % | --% |
| 65 & Over | 20.4% | 16.8% | -- % | --% |
| Number of Persons per Household | | | | |
| % by number of persons per household | | | | |
| One | 24.8% | 26.7% | -- % | --% |
| Two | 30.6% | 29.2% | -- % | --% |
| Three | 17.5% | 16.7% | -- % | --% |
| Four | 15.3% | 16.0% | -- % | --% |
| Five | 7.2% | 7.6% | -- % | --% |
| Six & Over | 4.6% | 3.9% | -- % | --% |
| Average Household Size | 2.74 | 2.68 | -- | -- |
| INCOME 1984 | | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 29,303 | $ 4,589 | $ 3,285 |
| Per Capita EBI | $ 10,813 | $ 13,211 | $ 12,862 | 12,364 |
| Median Household EBI | $ 25,496 | $ 32,698 | $ 23,596 | 26,092 |
| Household by EBI Groups | | | | |
| % Distribution | | | | |
| Under $10,000 | 16.9% | 10.5% | 18.6% | 15.5% |
| $10,000 - $24,999 | 32.0% | 25.2% | -- % | -- % |
| $25,000 & Over | 51.0% | 64.3% | -- % | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 74.7% | -- % | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 65.2% | -- % | -- % |

## 16. BALTIMORE, MARYLAND

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 60.5% | |
| Giant Food | 35 | 21.9 | (Own) Landover, MD |
| Food-A-Rama | 38 | 12.5 | B. Green & Co., Baltimore, MD |
| A&P | 44 | 12.0 | (Own) Baltimore, MD |
| Safeway | 20 | 6.3 | (Own) Landover, MD |
| Valu Food | 6 | 3.1 | (Own) Balto. & Super Rite Foods |
| Big "B" (Brown's) | 7 | 2.8 | P.A. & S. Small, York, PA |
| Kash 'n Karry | 6 | 1.9 | P.A. & S. Small, York, PA |
| E-Zee Markets | 3 | na | B. Green & Co., Baltimore, MD |
| Sanitary | 4 | na | B. Green & Co., Baltimore, MD |
| Royal Farms (C) | 44 | na | B. Green & Co., Baltimore, MD |
| Wawa (C) | 19 | na | (Own) Wawa, PA |
| 7-Eleven (C) | 92 | na | (Own) Falmouth, VA |
| High Dairy Stores (C) | 113 | na | M. Loeb, Laurel, MD |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 0.4% | |
| Eddie's | 4 | 0.4 | Rich Foods, Richmond, VA |
| LEADING INDEPENDENTS: | | 9.7% | |
| Mars | 8 | 5.1 | (Own) Baltimore, MD |
| Farm Fresh | 7 | 2.6 | B. Green & Co., Baltimore, MD |
| Santoni's | 6 | 2.0 | B. Green & Co., Baltimore, MD |
| Super Pride | 6 | na | P.A. & S. Small Co., York, PA |
| Shapiro's | 2 | na | Richfoods, Richmond, VA |
| Bi Rite | 5 | na | Richfoods, Richmond, VA |
| OTHER GROCERY STORES | 800 | 29.4% | |
| TOTAL | 1,269 | 100.0% | |

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na - not available
(C) Convenience Stores

Metropolitan Statistical Area:
Ann Arundel, Baltimore, Carroll, Harford, Howard, Queen Anne's Counties

Rank in U.S. based on supermarket sales 1984: 16

| | U.S. | MSA Total | Central City Baltimore |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 12,872 | $ 3,410 |
| Food Store Sales (millions) | $ 270,831 | $ 2,516 | $ 683 |
| % of total retail sales | 20.9% | 19.5% | 20.0% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,317 | $ 604 |
| % of Food Store Sales | 93.6% | 92.1% | 88.4% |
| Total number of Food Stores | 227,219 | *1,915 | 1,364 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,022.78 | $ 801.69 |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 2,265.4 | 753.4 |
| Total number of Households (thousands) | 86,926.6 | 815.4 | 278.0 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 5.6% | 6.0% |
| 25 - 34 Years | 23.1% | 23.7% | 21.8% |
| 35 - 44 Years | 19.0% | 20.5% | 16.6% |
| 45 - 54 Years | 15.0% | 16.1% | 14.8% |
| 55 - 64 Years | 15.5% | 16.5% | 17.5% |
| 65 & Over | 20.4% | 17.7% | 23.4% |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 23.4% | 28.7% |
| Two | 30.6% | 29.4% | 28.0% |
| Three | 17.5% | 19.0% | 17.1% |
| Four | 15.3% | 16.1% | 12.7% |
| Five | 7.2% | 7.3% | 6.8% |
| Six & Over | 4.6% | 4.8% | 6.9% |
| Average Household Size | 2.74 | 2.78 | 2.71 |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 24,170 | $ 6,314 |
| Per Capita EBI | $ 10,813 | $ 10,669 | $ 8,381 |
| Median Household EBI | $ 25,496 | $ 26,967 | $ 18,906 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 15.5% | 27.4% |
| $10,000 - $24,999 | 32.0% | 30.3% | 35.9% |
| $25,000 & Over | 51.0% | 54.1% | 36.8% |
| Projected EBI % change 1989/1984 | +65.9% | 59.6% | 48.7% |
| Projected average household EBI % change 1989/1984 | +55.1% | 51.8% | 52.6% |

* Does not include Queen Anne County.

## 17. PHOENIX, ARIZONA

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| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 100.0% | |
| Associated Grocers | 573 | 30.0 | na |
| Smitty's | 20 | 22.0 | Assoc. Grocers, Phoenix, AZ |
| Bayless | 35 | 14.5 | (Own) Phoenix, AZ |
| Orange Empire | 270 | 12.0 | na |
| Safeway | 31 | 11.0 | (Own) Phoenix, AZ |
| Fry's | 23 | 10.5 | Assoc. Grocers, Phoenix, AZ |
| Bashas | 30 | 9.0 | (Own) Chandler, AZ |
| Lucky | 22 | 7.0* | (Own) Phoenix, AZ |
| Alpha Beta | 29 | 7.0 | (Own) Phoenix, AZ |
| Circle K (C) | 225 | 5.0* | na |
| El Rancho | 12 | 3.5 | na |
| TOTAL | 1,270 | 100.0% | |

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(C) Convenience Stores

na - not available

* These figures are included in the Associated Grocers and Orange Empire percentages

Metropolitan Statistical Area:
Maricopa County

Rank in U.S. based on supermarket sales 1984: 17

| | U.S. | MSA Total | Central City Phoenix |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 10,725 | $ 5,511 |
| Food Store Sales (millions) | $ 270,831 | $ 2,392 | $ 1,233 |
| % of total retail sales | 20.9% | 22.2% | 22.4% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,294 | $ -- |
| % of Food Store Sales | 93.6% | 95.9% | -- % |
| Total number of Food Stores | 227,219 | 1,076 | 600 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,321.43 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,736.03 | 861.1 |
| Total number of Households (thousands) | 86,926.6 | 669.1 | 331.8 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 8.4% | -- % |
| 25 - 34 Years | 23.1% | 23.6% | -- % |
| 35 - 44 Years | 19.0% | 19.2% | -- % |
| 45 - 54 Years | 15.0% | 13.8% | -- % |
| 55 - 64 Years | 15.5% | 14.7% | -- % |
| 65 & Over | 20.4% | 20.2% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 25.7% | -- % |
| Two | 30.6% | 33.0% | -- % |
| Three | 17.5% | 16.3% | -- % |
| Four | 15.3% | 14.0% | -- % |
| Five | 7.2% | 6.7% | -- % |
| Six & Over | 4.6% | 4.3% | -- % |
| Average Household Size | 2.74 | 2.59 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 19,137 | $ 9,279 |
| Per Capita EBI | $ 10,813 | $ 11,024 | $ 10,776 |
| Median Household EBI | $ 25,496 | $ 25,153 | $ 24,681 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 14.9% | 15.8% |
| $10,000 - $24,999 | 32.0% | 34.7% | -- % |
| $25,000 & Over | 51.0% | 50.3% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 83.7% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 57.0% | -- % |

## 18. TAMPA, FLORIDA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Winn-Dixie | 57 | 24.0 | (Own) Jacksonville, FL |
| Publix | 50 | 23.0 | (Own) Lakeland, FL |
| Kash 'n Karry | 50 | 18.0 | Tampa Wholesale, Tampa, FL |
| Albertson's | 15 | 14.0 | (Own) Miami, FL |
| Family Mart | 12 | 5.0 | Publix, Lakeland, FL |
| U-Save | 11 | 3.0 | B&B Distributors, Tampa, FL |
| Jewel T Discount | 16 | 1.6 | B&B Distributors, Tampa, FL |
| Thriftway | 3 | 1.3 | na |
| Convenience Stores** | 300 | 1.1 | Various Suppliers |
| OTHER GROCERY STORES (includes independents) | 942 | 9.0% | |
| TOTAL | 1,456 | 100.0% | |

---

na - not available
** includes farm stores

Metropolitan Statistical Area:
Hernando, Hillsborough, Pinellas, Pasco Counties

Rank in U.S. based on supermarket sales 1984: 18

| | | | Central City | |
|---|---|---|---|---|
| | U.S. | MSA Total | Tampa | St. Petersburg |
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 10,950 | $ 2,635 | $ 1,484 |
| Food Store Sales (millions) | $ 270,831 | $ 2,354 | $ 415 | $ 311 |
| % of total retail sales | 20.9% | 21.5% | 15.7% | 21.0% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,222 | $ -- | $ -- |
| % of Food Store Sales | 93.6% | 94.4% | -- | -- |
| Total number of Food Stores | 227,219 | 1,805 | 487 | 270 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,209.32 | $ -- | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,837.4 | 276.7 | 244.1 |
| Total number of Households (thousands) | 86,926.6 | 763.2 | 111.4 | 108.2 |
| Population by Age of Household Head | | | | |
| Under 25 Years | 7.0% | 5.4% | -- % | -- % |
| 25 - 34 Years | 23.1% | 16.7% | -- % | -- % |
| 35 - 44 Years | 19.0% | 14.4% | -- % | -- % |
| 45 - 54 Years | 15.0% | 12.5% | -- % | -- % |
| 55 - 64 Years | 15.5% | 16.9% | -- % | -- % |
| 65 & Over | 20.4% | 34.2% | -- % | -- % |
| Number of Persons per Household | | | | |
| % by number of persons per household | | | | |
| One | 24.8% | 27.1% | -- % | -- % |
| Two | 30.6% | 39.8% | -- % | -- % |
| Three | 17.5% | 14.5% | -- % | -- % |
| Four | 15.3% | 11.0% | -- % | -- % |
| Five | 7.2% | 4.7% | -- % | -- % |
| Six & Over | 4.6% | 2.8% | -- % | -- % |
| Average Household Size | 2.74 | 2.41 | -- | -- |
| INCOME 1984 | | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 20,098 | $ 2,786 | $ 2,656 |
| Per Capita EBI | $ 10,813 | $ 10,938 | $ 10,069 | 10,881 |
| Median Household EBI | $ 25,496 | $ 21,561 | $ 19,795 | 19,169 |
| Household by EBI Groups | | | | |
| % Distribution | | | | |
| Under $10,000 | 16.9% | 18.3% | 24.3% | 22.7% |
| $10,000 - $24,999 | 32.0% | 39.6% | -- % | -- % |
| $25,000 & Over | 51.0% | 42.0% | -- % | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 79.8% | -- % | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 56.4% | -- % | -- % |

## 19. PITTSBURGH, PENNSYLVANIA

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | - | 85.9% | |
| Giant Eagle | 53 | 34.3 | (Own) Pittsburgh, PA |
| Shop 'n Save | 52 | 27.8 | Charley Bros., Greensburg, PA |
| Foodland | 74 | 18.7 | Fox Grocery Co., Belle Vernon, PA |
| Super Dollar IGA | 23 | 3.6 | Potter-McCune Co., McKeesport, PA |
| Golden Dawn | 10 | 1.5 | Peter J. Schmitt Co., Buffalo, NY |
| Friedman's | 9 | na | Peter J. Schmitt Co., Buffalo, NY |
| LEADING INDEPENDENTS: | | 2.7% | |
| Marraccini | 3 | 2.3 | Potter-McCune Co., McKeesport, PA |
| Haines | 2 | 0.4 | Potter-McCune Co., McKeesport, PA |
| OTHER GROCERY STORES | na | 11.4% | |
| TOTAL | 226+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Allegheny, Fayette, Washington, Westmoreland Counties

Rank in U.S. based on supermarket sales 1984: 19

| | U.S. | MSA Total | Central City Pittsburgh |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 11,152 | $ 2,416 |
| Food Store Sales (millions) | $ 270,831 | $ 2,393 | $ 495 |
| % of total retail sales | 20.9% | 21.5% | 20.5% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,205 | $ -- |
| % of Food Store Sales | 93.6% | 92.1% | -- % |
| Total number of Food Stores | 227,219 | 2,005 | 528 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,013.79 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 2,175.0 | 397.9 |
| Total number of Households (thousands) | 86,926.6 | 839.4 | 164.9 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 4.9% | -- % |
| 25 - 34 Years | 23.1% | 19.6% | -- % |
| 35 - 44 Years | 19.0% | 16.1% | -- % |
| 45 - 54 Years | 15.0% | 15.9% | -- % |
| 55 - 64 Years | 15.5% | 19.5% | -- % |
| 65 & Over | 20.4% | 24.1% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 27.4% | -- % |
| Two | 30.6% | 30.0% | -- % |
| Three | 17.5% | 17.5% | -- % |
| Four | 15.3% | 14.5% | -- % |
| Five | 7.2% | 6.9% | -- % |
| Six & Over | 4.6% | 3.7% | -- % |
| Average Household Size | 2.74 | 2.59 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 24,141 | $ 4,078 |
| Per Capita EBI | $ 10,813 | $ 11,099 | $ 10,249 |
| Median Household EBI | $ 25,496 | $ 25,779 | $ 20,161 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 16.9% | 25.2% |
| $10,000 - $24,999 | 32.0% | 31.5% | -- % |
| $25,000 & Over | 51.0% | 51.6% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 50.5% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 50.7% | -- % |

## 20. SEATTLE – EVERETT, WASHINGTON

| Market Area Covered:<br>Metropolitan Statistical Area<br>King and Snohomish Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 77.0% | |
| Safeway | 67 | 36.0 | (Own) Bellevue, WA |
| Albertson's | 34 | 12.0 | West Coast Whlsl. Groc. Co., Tacoma, WA |
| Lucky | 19 | 8.0 | West Coast Whlsl. Groc. Co., Tacoma, WA |
| Quality Food Centers (QFC) | 21 | 8.0 | West Coast Whlsl. Groc. Co., Tacoma, WA |
| Prairie Market | 28 | 4.0 | Assoc. Grocers, Inc. Seattle, WA |
| Tradewell | 18 | 3.0 | Assoc. Grocers, Inc. Seattle, WA |
| Fred Meyer | 6 | 2.0 | (Own) Portland, OR |
| B & M | 4 | 2.0 | West Coast Whlsl. Groc., Tacoma, WA |
| 7-Eleven (C) | 155 | 2.0 | McLane/Northwest, Tacoma, WA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 10.5% | |
| Mark-It Food/Discount | 2 | * | Assoc. Grocers, Inc., Seattle, WA |
| Olson's | 8 | 4.0 | Assoc. Grocers, Inc., Seattle, WA |
| Thriftway | 11 | 3.0 | Assoc. Grocers, Inc., Seattle, WA |
| IGA | 8 | 2.0 | American-Strevell, Portland, OR |
| Haggens | 2 | * | Assoc. Grocers, Inc., Seattle, WA |
| Top Foods | 2 | * | Assoc. Grocers, Inc., Seattle, WA |
| Puget Sound Consumer Co-op | 4 | 1.5 | Nutra Source, Seattle, WA |
| OTHER GROCERY STORES | na | 12.5% | |
| TOTAL | 389+ | 100.0% | |

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* Included in "Other Grocery Stores"
(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
King, Snohomish Counties

Rank in U.S. based on supermarket sales 1984: 20

| | U.S. | MSA Total | Central City Seattle |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 11,005 | $ 3,611 |
| Food Store Sales (millions) | $ 270,831 | $ 2,234 | $ 656 |
| % of total retail sales | 20.9% | 20.3% | 18.2% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,107 | $ -- |
| % of Food Store Sales | 93.6% | 94.3% | -- % |
| Total number of Food Stores | 227,219 | 1,131 | 493 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,239.48 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,699.9 | 487.4 |
| Total number of Households (thousands) | 86,926.6 | 676.3 | 224.7 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.9% | -- % |
| 25 - 34 Years | 23.1% | 26.6% | -- % |
| 35 - 44 Years | 19.0% | 20.5% | -- % |
| 45 - 54 Years | 15.0% | 14.0% | -- % |
| 55 - 64 Years | 15.5% | 14.3% | -- % |
| 65 & Over | 20.4% | 16.6% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 28.3% | -- % |
| Two | 30.6% | 32.2% | -- % |
| Three | 17.5% | 16.2% | -- % |
| Four | 15.3% | 14.3% | -- % |
| Five | 7.2% | 5.9% | -- % |
| Six & Over | 4.6% | 2.9% | -- % |
| Average Household Size | 2.74 | 2.51 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 23,021 | $ 6,702 |
| Per Capita EBI | $ 10,813 | $ 13,542 | $ 13,751 |
| Median Household EBI | $ 25,496 | $ 30,639 | $ 24,440 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 12.6% | 18.4% |
| $10,000 - $24,999 | 32.0% | 26.6% | -- % |
| $25,000 & Over | 51.0% | 60.7% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 77.6% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 63.8% | -- % |

## 21. SAN DIEGO, CALIFORNIA

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 90.5% | |
| Vons | 28 | 21.0 | (Own) El Monte, CA, A.M. Lewis, National City, CA |
| Food Basket | 25 | 18.0 | (Own) Buena Park, CA |
| Safeway | 45 | 13.5 | (Own) Los Angeles, CA |
| Alpha Beta | 23 | 10.0 | (Own) LaHabra, CA |
| Ralphs | 13 | 10.0 | (Own) Compton, CA |
| Big Bear | 25 | 7.5 | (Own) San Diego, CA; Certified Grocers, L.A., CA |
| Gemco | 8 | 7.0 | (Own) Buena Park, CA |
| Convenience Stores (7-Eleven, Corner Foods, U-Tote'm Hoagy's Corners, AM-PM Mini Markets, Quick Korners, Circle K, Lavicio's Deli Market) | 229 | 3.0 | Various Suppliers |
| Mayfair | 3 | 0.5 | Certified Grocers, L.A., CA |
| LEADING INDEPENDENTS: | | 0.5% | |
| Military Commissaries | 5 | 0.5 | (Own) San Diego, CA, A.M. Lewis, National City, CA |
| OTHER GROCERY STORES* | 330 | 9.0% | Certified Grocers, L.A., CA |
| TOTAL | 734 | 100.0% | |

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* Includes Albertson's, Windmill Farms, Frazier Farms, Price Club.

Metropolitan Statistical Area:
San Diego County

Rank in U.S. based on supermarket sales 1984: 21

| | U.S. | MSA Total | Central City San Diego |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 11,746 | $ 5,352 |
| Food Store Sales (millions) | $ 270,831 | $ 2,246 | $ 954 |
| % of total retail sales | 20.9% | 19.1% | 17.8% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,076 | $ -- |
| % of Food Store Sales | 93.6% | 92.4% | -- % |
| Total number of Food Stores | 227,219 | 1,379 | 645 |
| Supermarket Sales per capita | $ 1,063.62 | $ 995.54 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 2,085.3 | 969.1 |
| Total number of Households (thousands) | 86,926.6 | 766.5 | 363.0 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 9.1% | -- % |
| 25 - 34 Years | 23.1% | 25.8% | -- % |
| 35 - 44 Years | 19.0% | 18.8% | -- % |
| 45 - 54 Years | 15.0% | 14.0% | -- % |
| 55 - 64 Years | 15.5% | 14.3% | -- % |
| 65 & Over | 20.4% | 18.0% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 24.8% | -- % |
| Two | 30.6% | 34.2% | -- % |
| Three | 17.5% | 16.9% | -- % |
| Four | 15.3% | 14.0% | -- % |
| Five | 7.2% | 6.2% | -- % |
| Six & Over | 4.6% | 4.0% | -- % |
| Average Household Size | 2.74 | 2.72 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 25,199 | $ 11,837 |
| Per Capita EBI | $ 10,813 | $ 12,084 | $ 12,214 |
| Median Household EBI | $ 25,496 | $ 27,128 | $ 26,095 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 13.6% | 14.9% |
| $10,000 - $24,999 | 32.0% | 32.2% | -- % |
| $25,000 & Over | 51.0% | 54.2% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 75.7% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 54.0% | -- % |

## 22. CLEVELAND, OHIO

| Market Area Covered: Cuyhoga, Lake, Geauga & Medina Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 51.0% | |
| Pick-N-Pay/Edward's | 45 | 26.0 | (Own) Maple Heights, OH |
| Fazio's/Carl's | 29 | 17.5 | (Own) Bedford Heights, OH |
| Heinen's | 10 | 7.5 | (Own) Bedford Heights, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 41.8% | |
| Stop-N-Shop | 32 | 23.5 | American Seaway Foods, Cleveland, OH |
| Bi-Rite | 24 | 9.8 | American Seaway Foods, Cleveland, OH |
| Sav-Mor | 15 | 5.5 | Heritage Wholesale, Bedford Heights, OH |
| Eagle | 29 | 3.0 | American Seaway Foods, Cleveland, OH |
| OTHER GROCERY STORES | na | 7.2% | |
| TOTAL | 184+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Cuyahoga, Geauga, Lake, Medina Counties

Rank in U.S. based on supermarket sales 1984: 22

| | U.S. | MSA Total | Central City Cleveland |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 10,695 | $ 2,351 |
| Food Store Sales (millions) | $ 270,831 | $ 2,236 | $ 558 |
| % of total retail sales | 20.9% | 20.9% | 23.7% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,052 | $ -- |
| % of Food Store Sales | 93.6% | 91.8% | -- % |
| Total number of Food Stores | 227,219 | 1,639 | 941 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,103.76 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,859.1 | 541.3 |
| Total number of Households (thousands) | 86,926.6 | 707.0 | 214.7 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 5.7% | -- % |
| 25 - 34 Years | 23.1% | 21.5% | -- % |
| 35 - 44 Years | 19.0% | 18.1% | -- % |
| 45 - 54 Years | 15.0% | 16.1% | -- % |
| 55 - 64 Years | 15.5% | 18.0% | -- % |
| 65 & Over | 20.4% | 20.6% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 28.2% | -- % |
| Two | 30.6% | 29.1% | -- % |
| Three | 17.5% | 17.0% | -- % |
| Four | 15.3% | 14.3% | -- % |
| Five | 7.2% | 7.2% | -- % |
| Six & Over | 4.6% | 4.2% | -- % |
| Average Household Size | 2.74 | 2.63 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 21,011 | $ 4,517 |
| Per Capita EBI | $ 10,813 | $ 11,302 | $ 8,345 |
| Median Household EBI | $ 25,496 | $ 26,917 | $ 17,863 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 16.7% | 30.9% |
| $10,000 - $24,999 | 32.0% | 29.4% | -- % |
| $25,000 & Over | 51.0% | 53.9% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 54.4% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 55.1% | -- % |

## 23. NEWARK, NEW JERSEY

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 92.0% | |
| Shop Rite | 52 | 27.0 | Wakefern Food Corp., Elizabeth, NJ |
| Pathmark | 18 | 19.0 | (Own) Woodbridge, NJ |
| Foodtown | 59 | 16.0 | (Own) Twin County Grocers, Edison, NJ |
| A&P | 39 | 14.0 | (Own) Edison, NJ |
| Kings | 12 | 7.0 | White Rose Food Corp., Farmingdale, NY |
| Acme | 14 | 6.0 | (Own) Whippany, NJ |
| Grand Union | 10 | 3.0 | (Own) Elmwood Park, NJ |
| OTHER GROCERY STORES | na | 8.0% | |
| TOTAL | 204+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Essex, Morris, Somerset, Union Counties

Rank in U.S. based on supermarket sales 1984: 23

| | U.S. | MSA Total | Central City Newark |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 10,115 | $ 869 |
| Food Store Sales (millions) | $ 270,831 | $ 2,245 | $ 152 |
| % of total retail sales | 20.9% | 22.2% | 17.5% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,043 | $ -- |
| % of Food Store Sales | 93.6% | 91.0% | -- % |
| Total number of Food Stores | 227,219 | 2,309 | 456 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,093.44 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,868.4 | 313.4 |
| Total number of Households (thousands) | 86,926.6 | 668.9 | 108.8 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 4.0% | -- % |
| 25 - 34 Years | 23.1% | 20.6% | -- % |
| 35 - 44 Years | 19.0% | 21.2% | -- % |
| 45 - 54 Years | 15.0% | 17.2% | -- % |
| 55 - 64 Years | 15.5% | 17.5% | -- % |
| 65 & Over | 20.4% | 19.6% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 23.1% | -- % |
| Two | 30.6% | 28.3% | -- % |
| Three | 17.5% | 18.3% | -- % |
| Four | 15.3% | 16.7% | -- % |
| Five | 7.2% | 8.2% | -- % |
| Six & Over | 4.6% | 5.3% | -- % |
| Average Household Size | 2.74 | 2.79 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 25,557 | $ 2,352 |
| Per Capita EBI | $ 10,813 | $ 13,679 | $ 7,505 |
| Median Household EBI | $ 25,496 | $ 33,741 | $ 17,187 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 13.0% | 31.9% |
| $10,000 - $24,999 | 32.0% | 23.0% | -- % |
| $25,000 & Over | 51.0% | 64.0% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 59.1% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 56.5% | -- % |

## 24. RIVERSIDE – SAN BERNARDINO, ONTARIO, CALIFORNIA

### SAN BERNARDINO

Market Area Covered:
San Bernardino County

|  | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: |  | 88.1% |  |
| Stater Bros. | 37 | 31.7 | (Own) Colton, CA |
| Alpa Beta | 19 | 15.1 | (Own) La Habra, CA |
| Lucky/Gemco | 9 | 12.1 | (Own) Buena Park, CA |
| Vons | 11 | 11.2 | (Own) Los Angeles, CA |
| Safeway | 12 | 9.1 | (Own) Downey, CA |
| Base Commissary | 4 | * | na |
| Fedco | 1 | * | na |
| Circle K (C) | 27 | 3.0 | A.M. Lewis, Riverside, CA |
| Ralph's | 1 | 2.1 | (Own) Compton, CA |
| 7-Eleven (C) | 18 | 1.5 | A.M. Lewis, Riverside, CA |
| Stop N Go (C) | 6 | 1.4 | A.M. Lewis, Riverside, CA |
| Albertson's | 1 | 0.9 | (Own) Fullerton, CA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: |  |  |  |
| Orange Empire | 114 | * | (Own) A.M. Lewis, Riverside, CA |
| Certified Grocers | 108 | * | (Own) Los Angeles, CA |
| OTHER GROCERY STORES | 433 | 11.9% |  |
| TOTAL | 801 | 100.0% |  |

### RIVERSIDE

Market Area Covered:
Riverside County

|  | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: |  | 98.7% |  |
| Stater Bros. | 29 | 40.4 | (Own) Colton, CA |
| Vons | 11 | 28.2 | (Own) Los Angeles, CA |
| Alpha Beta | 18 | 12.7 | (Own) LaHabra, CA |
| Safeway | 13 | 7.6 | (Own) Downey, CA |
| Lucky | 9 | 4.7 | (Own) Buena Park, CA |
| Albertson's | 5 | 1.6 | (Own) Los Angeles, CA |
| Ralph's | 4 | 1.0 | (Own) Compton, CA |
| Gemco | 4 | 1.0 | (Own) Buena Park, CA |
| Circle K (C) | 13 | .5 | A.M. Lewis, Riverside, CA |
| 7-Eleven (C) | 13 | .5 | A.M. Lewis, Riverside, CA |
| Stop N Go (C) | 6 | .5 | A.M. Lewis, Riverside, CA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: |  |  |  |
| Orange Empire | 100 | na | (Own) A.M. Lewis, Riverside, CA |
| Certified Grocers | 99 |  | (Own) Los Angeles, CA |
| OTHER GROCERY STORES | 411 | .3% |  |
| TOTAL | 735 | 100.0% |  |

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na - not available
(C) Convenience Stores
* Included in "Other Grocery Stores"

Metropolitan Statistical Area:
Riverside, San Bernardino Counties

Rank in U.S. based on supermarket sales 1984: 24

| | U.S. | MSA Total | Central City Riverside |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 9,218 | $ 1,258 |
| Food Store Sales (millions) | $ 270,831 | $ 2,147 | $ 211 |
| % of total retail sales | 20.9% | 23.3% | 16.8% |
| Supermarket Sales (millions) | $ 253,433 | $ 2,024 | $ -- |
| % of Food Store Sales | 93.6% | 94.3% | -- % |
| Total number of Food Stores | 227,219 | 983 | 416 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,108.80 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,825.4 | 182.0 |
| Total number of Households (thousands) | 86,926.6 | 651.7 | 65.0 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.4% | -- % |
| 25 - 34 Years | 23.1% | 23.4% | -- % |
| 35 - 44 Years | 19.0% | 18.6% | -- % |
| 45 - 54 Years | 15.0% | 13.9% | -- % |
| 55 - 64 Years | 15.5% | 15.0% | -- % |
| 65 & Over | 20.4% | 21.7% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 21.4% | -- % |
| Two | 30.6% | 34.0% | -- % |
| Three | 17.5% | 16.9% | -- % |
| Four | 15.3% | 15.5% | -- % |
| Five | 7.2% | 7.2% | -- % |
| Six & Over | 4.6% | 4.9% | -- % |
| Average Household Size | 2.74 | 2.80 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 19,031 | $ 1,968 |
| Per Capita EBI | $ 10,813 | $ 10,425 | $ 10,813 |
| Median Household EBI | $ 25,496 | $ 25,442 | $ 26,956 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 15.7% | 14.4% |
| $10,000 - $24,999 | 32.0% | 33.4% | -- % |
| $25,000 & Over | 51.0% | 50.9% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 72.2% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 47.1% | -- % |

## 25. MIAMI, FLORIDA

| Market Area Covered:<br>San Bernardino County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 70.0% | |
| Publix | 29 | 30.0 | (Own) No. Miami, FL |
| Winn-Dixie/Kwik Chek | 46 | 30.0 | (Own) Hialeah, FL |
| Pantry Pride | 37 | 10.0 | (Own) Hialeah, FL |
| U-Tote-M (C) | 56 | * | Malone & Hyde |
| 7-Eleven (C) | 70 | * | (Own) Orlando, FL |
| Treasury | 2 | * | Malone & Hyde |
| Food Spot (C) | 28 | * | Assoc. Grocers, Hialeah, FL |
| Tom Thumb (C) | 5 | * | Assoc. Grocers, Hialeah, FL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 21.0% | |
| Associated Grocers | 195 | 12.0 | (Own) Hialeah, FL |
| Malone & Hyde | 212 | 9.0 | (Own) Hialeah, FL |
| LEADING INDEPENDENTS: | | | |
| Great Value | 8 | * | Assoc. Grocers, Hialeah, FL |
| OTHER GROCERY STORES | na | 9.0% | |
| TOTAL | 688+ | 100.0% | |

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* Included in "Other Grocery Stores"
(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
Dade County

Rank in U.S. based on supermarket sales 1984: 25

| | U.S. | MSA Total | Central City Miami |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 11,979 | $ 3,419 |
| Food Store Sales (millions) | $ 270,831 | $ 1,959 | $ 435 |
| % of total retail sales | 20.9% | 16.4% | 12.7% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,775 | $ -- |
| % of Food Store Sales | 93.6% | 90.6% | -- % |
| Total number of Food Stores | 227,219 | 1,776 | 599 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,010.88 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,755.9 | 384.5 |
| Total number of Households (thousands) | 86,926.6 | 651.0 | 147.3 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 4.9% | -- % |
| 25 - 34 Years | 23.1% | 18.6% | -- % |
| 35 - 44 Years | 19.0% | 18.7% | -- % |
| 45 - 54 Years | 15.0% | 16.5% | -- % |
| 55 - 64 Years | 15.5% | 15.9% | -- % |
| 65 & Over | 20.4% | 25.4% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 26.5% | -- % |
| Two | 30.6% | 32.2% | -- % |
| Three | 17.5% | 16.7% | -- % |
| Four | 15.3% | 13.5% | -- % |
| Five | 7.2% | 6.4% | -- % |
| Six & Over | 4.6% | 4.8% | -- % |
| Average Household Size | 2.74 | 2.70 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 18,660 | $ 3,297 |
| Per Capita EBI | $ 10,813 | $ 10,627 | $ 8,575 |
| Median Household EBI | $ 25,496 | $ 23,179 | $ 16,944 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 20.7% | 30.9% |
| $10,000 - $24,999 | 32.0% | 33.0% | -- % |
| $25,000 & Over | 51.0% | 46.3% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 62.7% | -- % |
| Projected average household EBI % change 1989/1984 | 55.1% | 52.2% | -- % |

## 26. KANSAS CITY, MISSOURI – KANSAS

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | Share of Customers* | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 43.0% | |
| Savemart | 18 | 11.0 | Milgram, Kansas City, MO |
| Food Barn | 13 | 11.0 | Safeway, Kansas City, MO |
| Thriftway | 28 | 10.0 | Assoc. Grocers, Kansas City, KS |
| Safeway | 22 | 8.0 | (Own) Kansas City, MO |
| Milgram | 11 | 3.0 | (Own) Kansas City, MO |
| Aldi | 7 | ** | (Own) Aurora, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 30.0% | |
| Price Chopper | 11 | 16.0 | Assoc. Grocers, Kansas City, KS |
| United Super | 37 | 11.0 | Fleming Foods, Kansas City, KS |
| Bob's IGA | 5 | 3.0 | (Own) Mexico, MO |
| LEADING INDEPENDENTS: | | 8.0% | |
| Hen House | 2 | 3.0 | Assoc. Grocers, Kansas City, KS |
| Dahl's | 7 | 3.0 | Assoc. Grocers, Kansas City, KS |
| Payless | 4 | 2.0 | Assoc. Grocers, Kansas City, KS |
| OTHER GROCERY STORES | na | 19.0% | |
| TOTAL | 165+ | 100.0% | |

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* Reflects shoppers store preference
** Included in "Other Grocery Stores"
na - not available

Metropolitan Statistical Area:
MO: Cass, Clay, Jackson, Lafayette, Platte, Ray Counties
KS: Johnson, Leavenworth, Miami, Wyandotte Counties

Rank in U.S. based on supermarket sales 1984: 26

| | U.S. | MSA Total | Central City Kansas City |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 9,667 | $ 703 |
| Food Store Sales (millions) | $ 270,831 | $ 1,807 | $ 167 |
| % of total retail sales | 20.9% | 18.7% | 23.8% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,734 | $ -- |
| % of Food Store Sales | 93.6% | 96.0% | -- % |
| Total number of Food Stores | 227,219 | 1,036 | 394 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,177.11 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,473.1 | 157.4 |
| Total number of Households (thousands) | 86,926.6 | 552.0 | 59.2 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.4% | -- % |
| 25 - 34 Years | 23.1% | 24.4% | -- % |
| 35 - 44 Years | 19.0% | 19.7% | -- % |
| 45 - 54 Years | 15.0% | 15.2% | -- % |
| 55 - 64 Years | 15.5% | 14.9% | -- % |
| 65 & Over | 20.4% | 18.5% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 25.7% | -- % |
| Two | 30.6% | 31.0% | -- % |
| Three | 17.5% | 17.6% | -- % |
| Four | 15.3% | 15.5% | -- % |
| Five | 7.2% | 6.5% | -- % |
| Six & Over | 4.6% | 3.6% | -- % |
| Average Household Size | 2.74 | 2.67 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 18,253 | $ 1,680 |
| Per Capita EBI | $ 10,813 | $ 12,391 | $ 10,673 |
| Median Household EBI | $ 25,496 | $ 29,826 | $ 25,880 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 13.0% | 17.9% |
| $10,000 - $24,999 | 32.0% | 27.8% | -- % |
| $25,000 & Over | 51.0% | 59.2% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 64.7% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 58.6% | -- % |

## 27. NEW ORLEANS, LOUISIANA

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 86.0% | |
| Schwegmann Bros. | 11 | 30.0 | (Own) New Orleans, LA |
| Winn-Dixie | 36 | 20.0 | (Own) New Orleans, LA |
| National-Canal Villers | 18 | 14.0 | (Own) New Orleans, LA |
| Delchamps | 11 | 14.0 | Mobile, AL |
| A&P | 20 | 8.0 | (Own) New Orleans, LA |
| Breaux Mart | 5 | * | (Own) New Orleans, LA |
| Time Saver Food Stores (C) | 109 | * | Goodman & Beer Co., New Orleans, LA |
| Li'l General Stores (C) | 15 | * | Church Point Wholesale Grocery Co., Church Point, LA |
| 7-Eleven (C) | 3 | * | Baton Rouge, LA |
| Piggly Wiggly | 2 | * | Shreveport, LA |
| Kart N Karry (C) | 13 | * | Kenner, LA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Louisiana Grocers Co-op | 21 | * | (Own) New Orleans, LA |
| Affiliated Foods | 3 | * | Broussard, LA |
| Super Valu Stores | 4 | * | Indianola, MS |
| Associated Grocers | 5 | * | Baton Rouge, LA |
| OTHER GROCERY STORES (including Convenience Stores) | 85 | 14.0% | |
| TOTAL | 361 | 100.0% | |

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* Included in "Other Grocery Stores"
(C) Convenience Stores

Metropolitan Statistical Area:
Jefferson, Orleans, St. Bernard, St. Charles, St. John the Baptist,
St. Tammany Parishes

Rank in U.S. based on supermarket sales 1984: 27

| | U.S. | MSA Total | Central City New Orleans |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 7,561 | $ 3,013 |
| Food Store Sales (millions) | $ 270,831 | $ 1,719 | $ 633 |
| % of total retail sales | 20.9% | 22.7% | 21.0% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,640 | $ 605 |
| % of Food Store Sales | 93.6% | 95.4% | 95.6% |
| Total number of Food Stores | 227,219 | 1,060 | 569 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,225.80 | $ 1,074.03 |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,337.9 | 563.3 |
| Total number of Households (thousands) | 86,926.6 | 487.5 | 215.3 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.6% | 7.4% |
| 25 - 34 Years | 23.1% | 26.3% | 25.0% |
| 35 - 44 Years | 19.0% | 19.7% | 16.9% |
| 45 - 54 Years | 15.0% | 15.1% | 13.8% |
| 55 - 64 Years | 15.5% | 14.7% | 15.4% |
| 65 & Over | 20.4% | 16.6% | 21.4% |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 26.6% | 32.3% |
| Two | 30.6% | 27.2% | 27.4% |
| Three | 17.5% | 18.0% | 16.0% |
| Four | 15.3% | 14.9% | 11.8% |
| Five | 7.2% | 7.6% | 6.3% |
| Six & Over | 4.6% | 5.7% | 6.1% |
| Average Household Size | 2.74 | 2.74 | 2.62 |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 13,568 | $ 5,241 |
| Per Capita EBI | $ 10,813 | $ 10,209 | $ 9,304 |
| Median Household EBI | $ 25,496 | $ 24,041 | $ 18,045 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 20.7% | 29.6% |
| $10,000 - $24,999 | 32.0% | 31.1% | 34.1% |
| $25,000 & Over | 51.0% | 48.1% | 36.3% |
| Projected EBI % change 1989/1984 | +65.9% | 71.4% | 63.7% |
| Projected average household EBI % change 1989/1984 | +55.1% | 57.7% | 58.5% |

## 28. SAN JOSE, CALIFORNIA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 82.0% | |
| Safeway | 26 | 22.0 | (Own) Fremont, CA |
| Lucky | 25 | 17.0 | (Own) San Leandro, CA |
| Alpha Beta | 24 | 17.0 | (Own) Milpitas, CA |
| Fry's | 10 | 8.0 | Certified, Los Angeles, CA |
| Nob Hill | 10 | 6.0 | Fleming Foods, San Leandro, CA |
| Albertson's | 4 | 4.0 | Fleming Foods, San Leandro, CA |
| Brentwood | 5 | 4.0 | Fleming Foods, San Leandro, CA |
| P.W. Super | 137 | 3.0 | United Grocers, Richmond, CA |
| 7-Eleven (C) | 6 | 1.0 | United Grocers, Cupertino, CA |
| Stop-N-Go (C) | 14 | * | United Grocers, Richmond, CA |
| Pak-n-Save | 3 | * | na |
| LEADING INDEPENDENTS: | | 8.0% | |
| Original Food Villa | 3 | 3.0 | United Grocers, Richmond, CA |
| H & S Food Villa | 4 | 3.0 | United Grocers, Richmond, CA |
| Food Fair | 3 | 2.0 | United Grocers, Richmond, CA |
| Lincoln Lane | 2 | * | United Grocers, San Jose, CA |
| Co-op Supermarkets | 3 | * | United Grocers, San Jose, CA |
| Food Plaza | 2 | * | United Grocers, San Jose, CA |
| OTHER GROCERY STORES | na | 10.0% | |
| TOTAL | 281+ | 100.0% | |

---

na - not available
(C) Convenience Stores
* Included in "Other Grocery Stores"

Metropolitan Statistical Area:
Santa Clara County

Rank in U.S. based on supermarket sales 1984: 28

| | U.S. | MSA Total | Central City San Jose |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 9,363 | $ 4,000 |
| Food Store Sales (millions) | $ 270,831 | $ 1,751 | $ 825 |
| % of total retail sales | 20.9% | 18.7% | 20.6% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,635 | $ -- |
| % of Food Store Sales | 93.6% | 93.4% | -- % |
| Total number of Food Stores | 227,219 | 983 | 416 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,186.93 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,377.5 | 691.4 |
| Total number of Households (thousands) | 86,926.6 | 485.9 | 231.0 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.7% | -- % |
| 25 - 34 Years | 23.1% | 27.0% | -- % |
| 35 - 44 Years | 19.0% | 23.3% | -- % |
| 45 - 54 Years | 15.0% | 16.0% | -- % |
| 55 - 64 Years | 15.5% | 13.4% | -- % |
| 65 & Over | 20.4% | 12.5% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 23.9% | -- % |
| Two | 30.6% | 30.4% | -- % |
| Three | 17.5% | 18.0% | -- % |
| Four | 15.3% | 16.1% | -- % |
| Five | 7.2% | 7.1% | -- % |
| Six & Over | 4.6% | 4.4% | -- % |
| Average Household Size | 2.74 | 2.83 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 19,845 | $ 8,915 |
| Per Capita EBI | $ 10,813 | $ 14,406 | $ 12,894 |
| Median Household EBI | $ 25,496 | $ 37,776 | $ 36,866 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 8.0% | 8.7% |
| $10,000 - $24,999 | 32.0% | 20.7% | -- % |
| $25,000 & Over | 51.0% | 71.3% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 72.3% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 57.0% | -- % |

## 29. SACRAMENTO, CALIFORNIA

| Market Area Covered:<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 90.0% | |
| Raley's | 50 | 28.0 | United Grocers, Sacramento, CA |
| Lucky/Gemco | 33 | 22.0 | (Own) San Leandro, CA |
| Safeway | 18 | 11.0 | (Own) Sacramento, CA |
| Pac n'Save | 3 | 10.0 | (Own) Milpitas, CA |
| Albertson's | 10 | 6.0 | Fleming Foods, Fremont, CA |
| Bel Air | 8 | 5.0 | Fleming Foods, Sacramento, CA |
| Jumbo | 10 | 5.0 | Fleming Foods, Fremont, CA |
| Alpha Beta | 12 | 3.0 | (Own) Milpitas, CA |
| OTHER GROCERY STORES | na | 10.0% | |
| TOTAL | 144+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
El Dorado, Placer, Sacramento, Yolo Counties

Rank in U.S. based on supermarket sales 1984: 29

| | U.S. | MSA Total | Central City Sacramento |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 7,233 | $ 2,018 |
| Food Store Sales (millions) | $ 270,831 | $ 1,546 | $ 405 |
| % of total retail sales | 20.9% | 21.4% | 20.1% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,471 | $ -- |
| % of Food Store Sales | 93.6% | 95.1% | -- % |
| Total number of Food Stores | 227,219 | 927 | 280 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,184.00 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,242.4 | 306.4 |
| Total number of Households (thousands) | 86,926.6 | 486.1 | 130.4 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 8.9% | -- % |
| 25 - 34 Years | 23.1% | 25.6% | -- % |
| 35 - 44 Years | 19.0% | 19.2% | -- % |
| 45 - 54 Years | 15.0% | 15.0% | -- % |
| 55 - 64 Years | 15.5% | 15.0% | -- % |
| 65 & Over | 20.4% | 16.3% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 27.3% | -- % |
| Two | 30.6% | 32.5% | -- % |
| Three | 17.5% | 17.4% | -- % |
| Four | 15.3% | 14.2% | -- % |
| Five | 7.2% | 5.7% | -- % |
| Six & Over | 4.6% | 2.9% | -- % |
| Average Household Size | 2.74 | 2.56 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 14,231 | $ 3,441 |
| Per Capita EBI | $ 10,813 | $ 11,454 | $ 11,230 |
| Median Household EBI | $ 25,496 | $ 25,768 | $ 22,061 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 15.9% | 21.5% |
| $10,000 - $24,999 | 32.0% | 32.6% | -- % |
| $25,000 & Over | 51.0% | 51.5% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 65.5% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 43.8% | -- % |

## 30. CINCINNATI, OHIO – KENTUCKY – INDIANA

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 68.1% | |
| Kroger | 47 | 49.8 | (Own) Cincinnati, OH |
| Thriftway | 17 | 15.8 | (Own) Cincinnati, OH |
| Convenience Food Mart | 43 | * | na |
| Food Mart | 1 | * | na |
| Super Valu | 7 | * | na |
| White Villa | 27 | * | na |
| Marsh's | 2 | 2.5 | (Own) Yorktown, IN |
| Stop-N-Go | 11 | * | Amerian Seaway Foods, Bedford Hgts., OH |
| United Dairy Farmers | 82 | * | na |
| King Kwik | 104 | * | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 17.7% | |
| IGA | 51 | 17.7 | Super Food Services, Bellefontaine, OH |
| U-Tote-M | 19 | * | na |
| OTHER GROCERY STORES | na | 14.2% | |
| TOTAL | 411+ | 100.0% | |

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* Included in "Other Grocery Stores"
na - not available

Metropolitan Statistical Area:
OH: Clermont, Hamilton, Warren Counties
KY: Boone, Campbell, Kenton Counties
IN: Dearborn County

Rank in U.S. based on supermarket sales 1984: 30

| | U.S. | MSA Total | Central City Cincinnati |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 7,815 | $ 2,125 |
| Food Store Sales (millions) | $ 270,831 | $ 1,620 | $ 383 |
| % of total retail sales | 20.9% | 20.7% | 18.0% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,441 | $ -- |
| % of Food Store Sales | 93.6% | 89.0% | -- % |
| Total number of Food Stores | 227,219 | 1,429 | 557 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,026.72 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,403.5 | 368.1 |
| Total number of Households (thousands) | 86,926.6 | 519.0 | 157.4 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.5% | -- % |
| 25 - 34 Years | 23.1% | 23.6% | -- % |
| 35 - 44 Years | 19.0% | 18.4% | -- % |
| 45 - 54 Years | 15.0% | 15.6% | -- % |
| 55 - 64 Years | 15.5% | 15.4% | -- % |
| 65 & Over | 20.4% | 19.6% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 27.2% | -- % |
| Two | 30.6% | 28.2% | -- % |
| Three | 17.5% | 17.5% | -- % |
| Four | 15.3% | 15.0% | -- % |
| Five | 7.2% | 7.4% | -- % |
| Six & Over | 4.6% | 4.7% | -- % |
| Average Household Size | 2.74 | 2.70 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 15,554 | $ 3,824 |
| Per Capita EBI | $ 10,813 | $ 11,082 | $ 10,388 |
| Median Household EBI | $ 25,496 | $ 26,864 | $ 19,752 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 16.1% | 25.8% |
| $10,000 - $24,999 | 32.0% | 30.1% | -- % |
| $25,000 & Over | 51.0% | 53.9% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 68.1% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 64.6% | -- % |

## 31. MILWAUKEE, WISCONSIN

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 75.0% | |
| Pick 'N Save | 19 | 37.0 | Roundy's, Milwaukee, WI |
| Kohl's | 45 | 20.0 | (Own) Milwaukee, WI |
| Sentry | 44 | 18.0 | (Own) Godfrey Co., Waukesha, WI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 10.0% | |
| Shop-Rite | 23 | 6.0 | Roundy's, Milwaukee, WI |
| Sav-U | 4 | 4.0 | Schultz Sav-U Stores, Sheboygan, WI |
| OTHER GROCERY STORES | na | 15.0% | |
| TOTAL | 135+ | 100.0% | |

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na - not available

Metropolitan Statistical Area.
Milwaukee, Ozaukee, Washington, Waukesha Counties

Rank in U.S. based on supermarket sales 1984: 31

| | U.S. | MSA Total | Central City Milwaukee |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 7,369 | $ 2,822 |
| Food Store Sales (millions) | $ 270,831 | $ 1,505 | $ 624 |
| % of total retail sales | 20.9% | 20.4% | 22.1% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,401 | $ -- |
| % of Food Store Sales | 93.6% | 93.1% | -- % |
| Total number of Food Stores | 227,219 | 788 | 543 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,007.26 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,390.9 | 608.7 |
| Total number of Households (thousands) | 86,926.6 | 523.1 | 243.9 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.4% | -- % |
| 25 - 34 Years | 23.1% | 24.0% | -- % |
| 35 - 44 Years | 19.0% | 18.4% | -- % |
| 45 - 54 Years | 15.0% | 15.5% | -- % |
| 55 - 64 Years | 15.5% | 15.3% | -- % |
| 65 & Over | 20.4% | 19.4% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 26.8% | -- % |
| Two | 30.6% | 29.4% | -- % |
| Three | 17.5% | 16.9% | -- % |
| Four | 15.3% | 15.0% | -- % |
| Five | 7.2% | 7.4% | -- % |
| Six & Over | 4.6% | 4.4% | -- % |
| Average Household Size | 2.74 | 2.66 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 16,391 | $ 6,321 |
| Per Capita EBI | $ 10,813 | $ 11,784 | $ 10,384 |
| Median Household EBI | $ 25,496 | $ 29,020 | $ 23,413 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 12.7% | 18.3% |
| $10,000 - $24,999 | 32.0% | 28.9% | -- % |
| $25,000 & Over | 51.0% | 58.4% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 60.2% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 58.2% | -- % |

## 32. COLUMBUS, OHIO

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 82.2% | |
| Kroger | 35 | 44.0 | (Own) Columbus, OH |
| Big Bear | 35 | 34.0 | (Own) Columbus, OH |
| Cardinal Food Stores | 22 | 3.2 | (Own) Columbus, OH |
| Gateway | 10 | * | Wetterau, Columbus, OH |
| Stumps | 7 | na | S.M. Flickinger Co., Columbus, OH |
| Little Giant | 4 | * | Wetterau, Columbus, OH |
| Lawson (C) | 47 | * | (Own) Cuyahoga Heights, OH |
| Food World | 8 | 1.0 | Seaway, Cleveland, OH |
| Cubs | 2 | na | Super Valu, Xenia, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 6.4% | |
| Super Duper | 19 | 4.3 | (Own) S.M. Flickinger Co., Columbus, OH |
| IGA (Super Food Services) | 24 | 2.1 | (Own) Bellefontaine, OH |
| LEADING INDEPENDENTS: | | * | |
| Tom Tarpy's Markets | 4 | * | Food Marketing Corp., Ft. Wayne, IN |
| OTHER GROCERY STORES | na | 11.4% | |
| TOTAL | 217+ | 100.0% | |

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* Included in "Other Grocery Stores"
(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
Delaware, Fairfield, Franklin, Licking, Madison, Pickaway, Union Counties

Rank in U.S. based on supermarket sales 1984: 32

| | U.S. | MSA Total | Central City Columbus |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 7,263 | $ 3,823 |
| Food Store Sales (millions) | $ 270,831 | $ 1,451 | $ 640 |
| % of total retail sales | 20.9% | 20.0% | 16.7% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,377 | $ -- |
| % of Food Store Sales | 93.6% | 95.0% | -- % |
| Total number of Food Stores | 227,219 | 2,036 | 941 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,074.77 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,281.2 | 564.1 |
| Total number of Households (thousands) | 86,926.6 | 483.9 | 228.3 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 9.5% | -- % |
| 25 - 34 Years | 23.1% | 26.0% | -- % |
| 35 - 44 Years | 19.0% | 19.3% | -- % |
| 45 - 54 Years | 15.0% | 15.0% | -- % |
| 55 - 64 Years | 15.5% | 14.0% | -- % |
| 65 & Over | 20.4% | 16.2% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 28.2% | -- % |
| Two | 30.6% | 29.2% | -- % |
| Three | 17.5% | 17.4% | -- % |
| Four | 15.3% | 15.0% | -- % |
| Five | 7.2% | 6.7% | -- % |
| Six & Over | 4.6% | 3.4% | -- % |
| Average Household Size | 2.74 | 2.65 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 13,827 | $ 5,792 |
| Per Capita EBI | $ 10,813 | $ 10,792 | $ 10,268 |
| Median Household EBI | $ 25,496 | $ 25,405 | $ 22,104 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 16.0% | 20.4% |
| $10,000 - $24,999 | 32.0% | 33.2% | -- % |
| $25,000 & Over | 51.0% | 50.9% | -- % |
| Projected EBI % change 1989/1984 | 65.9% | 69.9% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 61.7% | -- % |

## 33. SAN ANTONIO, TEXAS

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 87.0% | |
| H.E. Butt | 35 | 52.0 | (Own) Corpus Christi, TX |
| Handy Andy | 19 | 14.0 | Sweeney & Co., San Antonio, TX |
| Kroger | 13 | 12.0 | (Own) Houston, TX |
| Albertson's | 7 | 9.0 | Fleming Co., San Antonio, TX |
| LEADING INDEPENDENTS: | | 3.0% | |
| Warehouse Groceries | 10 | 3.0 | (Own) |
| OTHER GROCERY STORES | na | 10.0% | |
| TOTAL | 84+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Bexar, Comal, Guadalupe Counties

Rank in U.S. based on supermarket sales 1984: 33

| | U.S. | MSA Total | Central City San Antonio |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 6,432 | $ 5,266 |
| Food Store Sales (millions) | $ 270,831 | $ 1,391 | $ 1,087 |
| % of total retail sales | 20.9% | 21.6% | 20.6% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,343 | $ -- |
| % of Food Store Sales | 93.6% | 96.5% | -- % |
| Total number of Food Stores | 227,219 | 1,195 | 996 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,127.91 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,190.7 | 860.1 |
| Total number of Households (thousands) | 86,926.6 | 394.9 | 288.6 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.4% | -- % |
| 25 - 34 Years | 23.1% | 24.6% | -- % |
| 35 - 44 Years | 19.0% | 19.6% | -- % |
| 45 - 54 Years | 15.0% | 15.6% | -- % |
| 55 - 64 Years | 15.5% | 15.1% | -- % |
| 65 & Over | 20.4% | 17.7% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 21.0% | -- % |
| Two | 30.6% | 28.5% | -- % |
| Three | 17.5% | 18.2% | -- % |
| Four | 15.3% | 16.6% | -- % |
| Five | 7.2% | 8.5% | -- % |
| Six & Over | 4.6% | 7.3% | -- % |
| Average Household Size | 2.74 | 3.02 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 11,553 | $ 7,703 |
| Per Capita EBI | $ 10,813 | $ 9,703 | $ 8,956 |
| Median Household EBI | $ 25,496 | $ 24,521 | $ 22,372 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 17.7% | 20.1% |
| $10,000 - $24,999 | 32.0% | 33.3% | -- % |
| $25,000 & Over | 51.0% | 49.0% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 78.6% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 57.9% | -- % |

## 34. FORT LAUDERDALE – HOLLYWOOD, FLORIDA

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 93.0% | |
| Winn-Dixie | 52 | 35.0 | (Own) Pompano Beach, FL |
| Publix | 34 | 33.0 | (Own) Miami, FL |
| Albertson's | 9 | 10.0 | Super Food Services, Orlando, FL |
| Pantry Pride | 6 | 6.0 | Super Valu, Miami, FL |
| Pic-N-Pay/Payless/Buy Rite | 7 | 4.0 | Assoc. Grocers, Miami, FL |
| Grocery Warehouse | 1 | 3.0 | Assoc. Grocers, Miami, FL |
| 7-Eleven (C) | 96 | 2.0 | Southland Dist., Orlando, FL |
| Majik Markets (C) | 22 | * | Cert. Grocers, Jacksonville, FL |
| Quick Mart | 10 | * | Southland Dist., Orlando, FL |
| Circle K (C) | 52 | * | McLane Southeast, Athens, GA |
| The Family Mart | 1 | * | Super Food Services, Orlando, FL |
| Cumberland Farms | 40 | * | (Own) Riviera Beach, FL |
| Food Spot (C) | 10 | * | Assoc. Grocers, Miami, FL |
| Tenneco Food Stores (C) | 20 | * | Southland Dist., Orlando, FL |
| Mini Marts (C) | 30 | * | Southland Dist., Orlando, FL |
| Paks Food Stores | 3 | * | Assoc. Grocers, Miami, FL |
| Farm Stores (C) | 69 | * | Fleming Foods, Lakeland, FL |
| Stop 'N Go | 3 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 1.5% | |
| Associated Grocers | 13 | 1.5 | Assoc. Grocers, Miami, FL |
| LEADING INDEPENDENTS: | | 0.7% | |
| Sureway | 1 | 0.3 | Malone & Hyde, Miami, FL |
| Coral Ridge Market | 1 | 0.2 | Assoc. Grocers, Miami, FL |
| Oceanside Market | 1 | 0.2 | Assoc. Grocers, Miami, FL |
| OTHER GROCERY STORES | na | 4.8% | |
| TOTAL | 481+ | 100.0% | |

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* Included in "Other Grocery Stores"
(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
Broward County

Rank in U.S. based on supermarket sales 1984: 34

| | U.S. | MSA Total | Central City Ft. Lauderdale |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 8,125 | $ 2,052 |
| Food Store Sales (millions) | $ 270,831 | $ 1,408 | $ 226 |
| % of total retail sales | 20.9% | 17.3% | 11.0% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,244 | $ -- |
| % of Food Store Sales | 93.6% | 88.4% | -- % |
| Total number of Food Stores | 227,219 | 1,059 | 207 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,089.32 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,142.0 | 154.6 |
| Total number of Households (thousands) | 86,926.6 | 478.3 | 69.9 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 4.6% | -- % |
| 25 - 34 Years | 23.1% | 17.4% | -- % |
| 35 - 44 Years | 19.0% | 15.5% | -- % |
| 45 - 54 Years | 15.0% | 12.6% | -- % |
| 55 - 64 Years | 15.5% | 15.9% | -- % |
| 65 & Over | 20.4% | 33.9% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 28.0% | -- % |
| Two | 30.6% | 40.0% | -- % |
| Three | 17.5% | 14.0% | -- % |
| Four | 15.3% | 10.8% | -- % |
| Five | 7.2% | 4.7% | -- % |
| Six & Over | 4.6% | 2.6% | -- % |
| Average Household Size | 2.74 | 2.39 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 14,521 | $ 2,155 |
| Per Capita EBI | $ 10,813 | $ 12,715 | $ 13,939 |
| Median Household EBI | $ 25,496 | $ 25,411 | $ 23,400 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 14.4% | 17.6% |
| $10,000 - $24,999 | 32.0% | 34.7% | -- % |
| $25,000 & Over | 51.0% | 50.9% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 75.8% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 54.3% | -- % |

## 35. INDIANAPOLIS, INDIANA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 66.0% | |
| Kroger | 32 | 21.0 | (Own) Indianapolis, IN |
| Marsh | 28 | 20.0 | (Own) Yorktown, IN |
| Preston/Safeway | 8 | 9.0 | Allied Grocers of Ind., Indianapolis, IN |
| A&P | 11 | 8.0 | (Own) Indianapolis, IN |
| Big E | 8 | 5.0 | Jewel Tea, Champaign, IL |
| Village Pantry (C) | 62 | 1.5 | Marsh, Yorktown, IN |
| 7-Eleven (C) | 6 | 1.5 | Grocers' Supply, Indianapolis, IN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.0% | |
| IGA | 20 | 5.0 | Wetterau Foods, Bloomington, IN |
| LEADING INDEPENDENTS: | | 2.0% | |
| Super Valu | 12 | 2.0 | Food Marketing Corp., Ft. Wayne, IN |
| O'Malia's | 5 | na | Grocers' Supply, Indianapolis, IN |
| OTHER GROCERY STORES | na | 27.0% | |
| TOTAL | 192+ | 100.0% | |

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(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
Boone, Hamilton, Hancock, Hendricks, Johnson, Marion, Morgan, Shelby Counties

Rank in U.S. based on supermarket sales 1984: 35

| | U.S. | MSA Total | Central City Indianapolis |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 7,568 | $ 5,389 |
| Food Store Sales (millions) | $ 270,831 | $ 1,287 | $ 849 |
| % of total retail sales | 20.9% | 17.0% | 15.8% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,229 | $ -- |
| % of Food Store Sales | 93.6% | 95.5% | -- % |
| Total number of Food Stores | 227,219 | 717 | 526 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,025.28 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,198.7 | 708.5 |
| Total number of Households (thousands) | 86,926.6 | 438.4 | 269.5 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.8% | -- % |
| 25 - 34 Years | 23.1% | 24.7% | -- % |
| 35 - 44 Years | 19.0% | 19.7% | -- % |
| 45 - 54 Years | 15.0% | 15.4% | -- % |
| 55 - 64 Years | 15.5% | 14.9% | -- % |
| 65 & Over | 20.4% | 17.5% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 23.9% | -- % |
| Two | 30.6% | 30.4% | -- % |
| Three | 17.5% | 18.0% | -- % |
| Four | 15.3% | 16.2% | -- % |
| Five | 7.2% | 7.3% | -- % |
| Six & Over | 4.6% | 4.2% | -- % |
| Average Household Size | 2.74 | 2.73 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 13,136 | $ 7,955 |
| Per Capita EBI | $ 10,813 | $ 10,958 | $ 11,228 |
| Median Household EBI | $ 25,496 | $ 27,154 | $ 26,261 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 14.1% | 15.4% |
| $10,000 - $24,999 | 32.0% | 31.2% | -- % |
| $25,000 & Over | 51.0% | 54.7% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 71.3% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 63.4% | -- % |

## 36. HARTFORD, CONNECTICUT

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Market Area Covered:
Hartford, Middlesex & Tolland Counties

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 72.9% | |
| Stop & Shop | 14 | 20.3 | (Own) North Haven, CT |
| First National (Finast & Edwards) | 18 | 17.4 | (Own) Windsor Locks, CT |
| Food Mart | 18 | 11.3 | Springfield Sugar, Suffield, CT |
| Mott's Shop Rite | 10 | 10.5 | (Own) E. Hartford, CT |
| Greenfield Warehouse Foods | 6 | 5.4 | Sprinfgield Sugar, Suffield, CT |
| Purity/Heartland | 2 | 5.2 | (Own) North Billerica, MA |
| A&P | 7 | 2.8 | Springfield Sugar, Suffield, CT |
| LEADING INDEPENDENTS: | | 14.2% | |
| Geisler's | 14 | 2.2 | Springfield Sugar, Suffield, CT |
| Fitzgerald's | 2 | 1.6 | Allied Grocer's, Windsor, CT |
| Andy's Food Town | 3 | 1.5 | Springfield Sugar, Suffield, CT |
| Frank's | 2 | 1.5 | Springfield Sugar, Suffield, CT |
| Highland Park Markets | 2 | 0.9 | Springfield Sugar, Suffield, CT |
| Sussman's | 3 | 0.9 | Bozutto's, Cheshire, CT |
| Men Doz | 1 | 0.7 | na |
| Mitchell's | 1 | 0.7 | Springfield Sugar, Suffield, CT |
| Crown Markets | 1 | 0.6 | Springfield Sugar, Suffield, CT |
| Colonial IGA | 1 | 0.6 | Bozutto's, Cheshire, CT |
| Better Value | 1 | 0.5 | na |
| Town & Country Markets | 2 | 0.5 | na |
| Town Foods | 1 | 0.4 | Allied Grocers, Windsor, CT |
| Guido's | 1 | 0.4 | Allied Grocers, Windsow, CT |
| Armata's | 1 | 0.4 | na |
| Everybody's | 1 | 0.3 | Springfield Sugar, Suffield, CT |
| Waz's IGA | 1 | 0.2 | Bozzuto's, Cheshire, CT |
| LaBonne's Epicure | 1 | 0.2 | Bozzuto's, Cheshire, CT |
| Benton Markets | 1 | 0.1 | na |
| OTHER GROCERY STORES | na | 12.9% | |
| TOTAL | 115+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Hartford, Middlesex, Tolland Counties

Rank in U.S. based on supermarket sales 1984: 36

| | U.S. | MSA Total | Central City Hartford |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 6,720 | $ 674 |
| Food Store Sales (millions) | $ 270,831 | $ 1,310 | $ 89 |
| % of total retail sales | 20.9% | 19.5% | 13.2% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,226 | $ -- |
| % of Food Store Sales | 93.6% | 93.6% | -- % |
| Total number of Food Stores | 227,219 | 835 | 140 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,155.84 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,060.7 | 133.3 |
| Total number of Households (thousands) | 86,926.6 | 387.8 | 51.6 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 5.7% | -- % |
| 25 - 34 Years | 23.1% | 22.4% | -- % |
| 35 - 44 Years | 19.0% | 19.6% | -- % |
| 45 - 54 Years | 15.0% | 15.9% | -- % |
| 55 - 64 Years | 15.5% | 17.0% | -- % |
| 65 & Over | 20.4% | 19.4% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 24.6% | -- % |
| Two | 30.6% | 30.6% | -- % |
| Three | 17.5% | 17.6% | -- % |
| Four | 15.3% | 16.1% | -- % |
| Five | 7.2% | 7.4% | -- % |
| Six & Over | 4.6% | 3.7% | -- % |
| Average Household Size | 2.74 | 2.74 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 14,330 | $ 1,267 |
| Per Capita EBI | $ 10,813 | $ 13,510 | $ 9,505 |
| Median Household EBI | $ 25,496 | $ 33,599 | $ 19,848 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 10.2% | 23.5% |
| $10,000 - $24,999 | 32.0% | 24.1% | -- % |
| $25,000 & Over | 51.0% | 65.7% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 58.5% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 53.5% | -- % |

## 37. OKLAHOMA CITY, OKLAHOMA

Market Area Covered:
Metropolitan Statistical Area

|  | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: |  | 38.4% |  |
| Safeway | 25 | 18.5 | (Own) Oklahoma City, OK |
| Skagg's Alpha Beta | 6 | 10.1 | Waples-Platter Co., Ft. Worth, TX |
| Food World | 10 | 5.8 | Scrivner, Oklahoma City, OK |
| Humpty Dumpty | 9 | 4.0 | (Own) Oklahoma City, OK |
| 7-Eleven (C) | 68 | na | Oklahoma City, OK |
| Circle K (C) | 62 | na |  |
| VOLUNTARY &/OR COOPERATIVE GROUPS: |  | 18.4% |  |
| IGA | 26 | 15.8 | Fleming Co., Oklahmoma City, OK |
| Red Bud/Best Yet | na | 2.6 | Scrivner, Oklahoma City, OK |
| LEADING INDEPENDENTS: |  | 35.5% |  |
| Pratt's | 3 | 6.6 | na |
| Grider Foods | 3 | 6.5 | Scrivner, Oklahoma City, OK |
| Crest | 1 | 5.5 | na |
| Tinker Field Commissary | 1 | 4.2 | na |
| Buchanan | 4 | 3.1 | Fleming Co., Oklahoma City, OK |
| Brannon's | 2 | 2.3 | Fleming Co., Oklahoma City, OK |
| McCartney's | 2 | 1.9 | Fleming Co., Oklahoma City, OK |
| Warehouse Market | 1 | 1.5 | na |
| Kennard's | 1 | 1.3 | Scrivner, Oklahoma City, OK |
| Whittaker's | 2 | 1.1 |  |
| Sam's Wholesale Club | 1 | 1.0 | na |
| AMC | 1 | .5 | na |
| OTHER GROCERY STORES | na | 7.7% |  |
| TOTAL | 228+ | 100.0% |  |

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(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
Canadian, Cleveland, Logan, McClain, Oklahoma, Pottawatomie Counties

Rank in U.S. based on supermarket sales 1984: 37

| | U.S. | MSA Total | Central City Oklahoma City |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 7,096 | $ 3,912 |
| Food Store Sales (millions) | $ 270,831 | $ 1,270 | $ 555 |
| % of total retail sales | 20.9% | 17.9% | 14.2% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,224 | $ -- |
| % of Food Store Sales | 93.6% | 96.4% | -- % |
| Total number of Food Stores | 227,219 | 643 | 340 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,259.52 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 971.8 | 440.1 |
| Total number of Households (thousands) | 86,926.6 | 369.7 | 178.8 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 9.7% | -- % |
| 25 - 34 Years | 23.1% | 25.2% | -- % |
| 35 - 44 Years | 19.0% | 19.2% | -- % |
| 45 - 54 Years | 15.0% | 14.5% | -- % |
| 55 - 64 Years | 15.5% | 13.6% | -- % |
| 65 & Over | 20.4% | 17.8% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 25.8% | -- % |
| Two | 30.6% | 32.0% | -- % |
| Three | 17.5% | 17.6% | -- % |
| Four | 15.3% | 15.3% | -- % |
| Five | 7.2% | 6.2% | -- % |
| Six & Over | 4.6% | 3.0% | -- % |
| Average Household Size | 2.74 | 2.63 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 11,247 | $ 5,343 |
| Per Capita EBI | $ 10,813 | $ 11,574 | $ 12,140 |
| Median Household EBI | $ 25,496 | $ 26,329 | $ 25,223 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 15.3% | 16.7% |
| $10,000 - $24,999 | 32.0% | 31.9% | -- % |
| $25,000 & Over | 51.0% | 52.7% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 76.3% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 53.9% | -- % |

## 38. PORTLAND, OREGON

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | Share of Customers | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 66.0% | |
| Fred Meyer | 26 | 28.0 | (Own) Portland, OR |
| Safeway | 37 | 14.0 | (Own) Clackamas, OR |
| Albertson's | 24 | 11.0 | West Coast Grocery, Salem, OR |
| Kienow's | 13 | 4.0 | United Grocers, Milwaukie, OR |
| Waremart | 6 | 4.0 | West Coast Grocery, Salem, OR |
| Keil's* | 5 | 3.0 | Fleming Companies, Milwaukie, OR |
| Prairie Market | 12 | 2.0 | (Own) Kent, WA |
| Tradewell | na | na | (Own) Kent, WA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 28.0% | |
| Thriftway | 63 | 24.0 | United Grocers, Milwaukie, OR |
| IGA | 10 | 2.0 | Fleming Companies, Milwaukie, OR |
| Sentry Markets | 6 | 1.0 | United Grocers, Milwaukie, OR |
| Food Warehouse | 5 | 1.0 | United Grocers, Milwaukie, OR |
| OTHER GROCERY STORES | na | 6.0% | |
| TOTAL | 207+ | 100.0% | |

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na - not available
* - purchased by Safeway 3/10/85

Metropolitan Statistical Area:
OR: Clackamas, Multnomah, Washington, Yamhill Counties

Rank in U.S. based on supermarket sales 1984: 38

|  | U.S. | MSA Total | Central City Portland |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 6,987 | $ 2,651 |
| Food Store Sales (millions) | $ 270,831 | $ 1,208 | $ 367 |
| % of total retail sales | 20.9% | 17.3% | 13.8% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,138 | $ -- |
| % of Food Store Sales | 93.6% | 94.2% | -- % |
| Total number of Food Stores | 227,219 | 918 | 369 |
| Supermarket Sales per capita | $ 1,063.62 | $ 997.72 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,140.6 | 365.0 |
| Total number of Households (thousands) | 86,926.6 | 445.0 | 159.1 |
| Population by Age of Household Head |  |  |  |
| Under 25 Years | 7.0% | 8.0% | -- % |
| 25 - 34 Years | 23.1% | 26.8% | -- % |
| 35 - 44 Years | 19.0% | 19.3% | -- % |
| 45 - 54 Years | 15.0% | 13.0% | -- % |
| 55 - 64 Years | 15.5% | 13.8% | -- % |
| 65 & Over | 20.4% | 19.1% | -- % |
| Number of Persons per Household |  |  |  |
| % by number of persons per household |  |  |  |
| One | 24.8% | 27.7% | -- % |
| Two | 30.6% | 32.9% | -- % |
| Three | 17.5% | 16.3% | -- % |
| Four | 15.3% | 14.2% | -- % |
| Five | 7.2% | 5.8% | -- % |
| Six & Over | 4.6% | 3.0% | -- % |
| Average Household Size | 2.74 | 2.56 | % |
| INCOME 1984 |  |  |  |
| Net Effective Buying Income (millions) | $2,576,533 | $ 12,996 | $ 4,027 |
| Per Capita EBI | $ 10,813 | $ 11,394 | $ 11,033 |
| Median Household EBI | $ 25,496 | $ 26,264 | $ 21,455 |
| Household by EBI Groups |  |  |  |
| % Distribution |  |  |  |
| Under $10,000 | 16.9% | 14.8% | 21.0% |
| $10,000 - $24,999 | 32.0% | 32.5% | -- % |
| $25,000 & Over | 51.0% | 52.7% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 77.9% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 71.1% | -- % |

## 39. BUFFALO. NEW YORK

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Tops Markets | 40 | 31.0 | Niagara Frontier Services, Buffalo, NY |
| Super Duper | 33 | 28.0 | S.M. Flickinger, Buffalo, NY |
| Bells | 35 | 27.0 | Peter J. Schmitt, Buffalo, NY |
| Wegman Food Markets | 3 | 5.0 | Wegman, Rochester, NY |
| IGA-Key Foods | 5 | | |
| Holly Farm | 12 | * | |
| Food Valu | 4 | | Tripifoods Inc., Buffalo, NY |
| Busymart | 10 | | |
| Federal Meat Markets | 21 | * | (Own) Williamsville, NY |
| Food King | 7 | * | Bishop, Buffalo, NY |
| Columbia Markets | 2 | * | Limco Imports, Buffalo, NY |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Wilson Farms | 43 | * | Niagara Frontier Services, Buffalo, NY |
| Convenient Food Markts | 34 | * | S.M. Flickinger, Buffalo, NY |
| 7-Eleven | 24 | * | S.M. Flickinger, Buffalo, NY |
| Corner Store | 11 | * | S.M. Flickinger, Buffalo, NY |
| Stop N Go Foods | 9 | * | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| B-Kwik | 13 | * | Niagara Frontier Services, Buffalo, NY |
| Bishop Stores | 12 | * | (Own) Buffalo, NY |
| Red & White | 4 | * | S.M. Flickinger, Buffalo, NY |
| OTHER GROCERY STORES | na | 9.0% | |
| TOTAL | 322+ | 100.0% | |

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* Included in "Other Grocery Stores"
na - not available

Metropolitan Statistical Area:
Erie County

Rank in U.S. based on supermarket sales 1984: 39

| | U.S. | MSA Total | Central City Buffalo |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 4,823 | $ 1,218 |
| Food Store Sales (millions) | $ 270,831 | $ 1,240 | $ 390 |
| % of total retail sales | 20.9% | 25.7% | 32.0% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,117 | $ -- |
| % of Food Store Sales | 93.6% | 90.1% | -- % |
| Total number of Food Stores | 227,219 | 879 | 551 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,128.05 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 990.2 | 339.1 |
| Total number of Households (thousands) | 86,926.6 | 364.6 | 137.1 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 5.5% | -- % |
| 25 - 34 Years | 23.1% | 20.4% | -- % |
| 35 - 44 Years | 19.0% | 17.2% | -- % |
| 45 - 54 Years | 15.0% | 16.3% | -- % |
| 55 - 64 Years | 15.5% | 18.4% | -- % |
| 65 & Over | 20.4% | 22.3% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 25.7% | -- % |
| Two | 30.6% | 29.9% | -- % |
| Three | 17.5% | 17.2% | -- % |
| Four | 15.3% | 15.0% | -- % |
| Five | 7.2% | 7.6% | -- % |
| Six & Over | 4.6% | 4.6% | -- % |
| Average Household Size | 2.74 | 2.72 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 10,522 | $ 3,085 |
| Per Capita EBI | $ 10,813 | $ 10,626 | $ 9,098 |
| Median Household EBI | $ 25,496 | $ 26,389 | $ 18,400 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 16.6% | 27.4% |
| $10,000 - $24,999 | 32.0% | 30.5% | -- % |
| $25,000 & Over | 51.0% | 52.9% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 38.4% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 39.2% | -- % |

## 40. ROCHESTER, NEW YORK

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 90.0% | |
| Wegman's Food Markets | 25 | 56.0 | (Own) Rochester, NY |
| Tops | 10 | 16.0 | Niagara Frontier, Buffalo, NY |
| Bells | 18 | 8.0 | Peter J. Schmitt, Buffalo, NY |
| Apple's | 12 | 10.0 | Peter J. Schmitt, Buffalo, NY |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.0% | |
| Big M Supermarkets | 14 | 3.0 | Netti Whlsl. (Div. P&C), Syracuse, NY |
| Super Duper | 13 | 2.0 | S.M. Flickinger Co., Buffalo, NY |
| OTHER GROCERY STORES | na | 5.0% | |
| TOTAL | 92+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Livingston, Monroe, Ontario, Orleans, Wayne Counties

Rank in U.S. based on supermarket sales 1984: 40

| | U.S. | MSA Total | Central City Rochester |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 5,210 | $ 1,142 |
| Food Store Sales (millions) | $ 270,831 | $ 1,142 | $ 217 |
| % of total retail sales | 20.9% | 21.9% | 19.0% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,082 | $ -- |
| % of Food Store Sales | 93.6% | 94.7% | -- % |
| Total number of Food Stores | 227,219 | 865 | 305 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,083.95 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 998.2 | 243.0 |
| Total number of Households (thousands) | 86,926.6 | 362.8 | 98.9 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 6.9% | -- % |
| 25 - 34 Years | 23.1% | 23.9% | -- % |
| 35 - 44 Years | 19.0% | 19.4% | -- % |
| 45 - 54 Years | 15.0% | 14.9% | -- % |
| 55 - 64 Years | 15.5% | 15.4% | -- % |
| 65 & Over | 20.4% | 19.4% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 25.4% | -- % |
| Two | 30.6% | 29.6% | -- % |
| Three | 17.5% | 17.2% | -- % |
| Four | 15.3% | 16.1% | -- % |
| Five | 7.2% | 7.6% | -- % |
| Six & Over | 4.6% | 4.2% | -- % |
| Average Household Size | 2.74 | 2.75 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 11,961 | $ 2,492 |
| Per Capita EBI | $ 10,813 | $ 11,983 | $ 10,255 |
| Median Household EBI | $ 25,496 | $ 30,404 | $ 21,777 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 12.4% | 22.5% |
| $10,000 - $24,999 | 32.0% | 27.2% | -- % |
| $25,000 & Over | 51.0% | 60.4% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 51.6% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 44.0% | -- % |

## 41. MEMPHIS – TENNESSEE, ARKANSAS, MISSISSIPPI

| Market Area Covered:<br>Shelby Country | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Kroger | 16 | na | (Own) Memphis, TN |
| Pic-Pac Food Stores | 8 | na | Malone & Hyde, Memphis, TN |
| 7-Eleven (C) | 59 | na | Southland Corp., Tyler, TX |
| Mega Market | 3 | na | Malone & Hyde, Memphis, TN |
| Piggly Wiggly | 6 | na | Malone & Hyde, Memphis, TN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Big Star Food Stores | 20 | na | Malone & Hyde, Memphis, TN |
| Food Rite | 12 | na | Malone & Hyde, Memphis, TN |
| LEADING INDEPENDENTS: | | | |
| Seesel's | 7 | na | Malone & Hyde, Memphis, TN |
| Food Depo | 1 | na | Lewis Grocer Co., Indianola, MS |
| OTHER GROCERY STORES | na | na | |
| TOTAL | 132+ | na | |

---

(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
TN: Shelby, Tipton Counties
AK: Crittenden County
MS: DeSoto County

Rank in U.S. based on supermarket sales 1984: 41

| | U.S. | MSA Total | Central City Memphis |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 5,515 | $ 4,302 |
| Food Store Sales (millions) | $ 270,831 | $ 1,137 | $ 820 |
| % of total retail sales | 20.9% | 20.6% | 19.1% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,078 | $ -- |
| % of Food Store Sales | 93.6% | 94.8% | -- % |
| Total number of Food Stores | 227,219 | 935 | 719 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,162.64 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 927.2 | 649.0 |
| Total number of Households (thousands) | 86,926.6 | 325.8 | 237.8 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.1% | -- % |
| 25 - 34 Years | 23.1% | 25.8% | -- % |
| 35 - 44 Years | 19.0% | 19.7% | -- % |
| 45 - 54 Years | 15.0% | 15.0% | -- % |
| 55 - 64 Years | 15.5% | 14.6% | -- % |
| 65 & Over | 20.4% | 17.7% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 22.6% | -- % |
| Two | 30.6% | 29.0% | -- % |
| Three | 17.5% | 19.0% | -- % |
| Four | 15.3% | 16.1% | -- % |
| Five | 7.2% | 7.3% | -- % |
| Six & Over | 4.6% | 6.1% | -- % |
| Average Household Size | 2.74 | 2.85 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 8,869 | $ 6,194 |
| Per Capita EBI | $ 10,813 | $ 9,565 | $ 9,544 |
| Median Household EBI | $ 25,496 | $ 22,897 | $ 21,462 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 21.9% | 23.6% |
| $10,000 - $24,999 | 32.0% | 32.4% | -- % |
| $25,000 & Over | 51.0% | 45.8% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 69.0% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 63.3% | -- % |

## 42. LOUISVILLE, KENTUCKY – INDIANA

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Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | Share of Customers* | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 67.0% | |
| Kroger | 33 | 43.0 | (Own) Louisville, KY |
| Winn-Dixie | 30 | 24.0 | (Own) Louisville, KY |
| LEADING CONVENIENCE STORE CHAINS: | | 1.0% | |
| Convenient Food Mart | 96 | 1.0 | Winkler Wholesale, Dale, IN |
| Save-A-Step | 18 | ** | na |
| Majik | 12 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 8.0% | |
| Creasey Co. | | | (Own) Louisville, KY |
| Gateway | 8 | 4.0 | |
| Key Market | 16 | 4.0 | |
| LEADING INDEPENDENTS: | | 17.0% | |
| Warehouse of Groceries | 3 | 4.0 | Malone & Hyde, Nicholasville, KY |
| Buy-Low Foods | 3 | 4.0 | W.T. Sistrunk, Lexington, KY |
| Melton Markets | 9 | 3.0 | Malone & Hyde, Nicholasville, KY |
| Pic Pac | 11 | 3.0 | Malone & Hyde, Nicholasville, KY |
| Valu Supermarkets | 3 | 3.0 | Scot Lad, Lima, OH |
| Rite Shop Foods | 2 | na | Malone & Hyde, Nicholasville, KY |
| OTHER GROCERY STORES | na | 7.0% | |
| TOTAL | 244+ | 100.0% | |

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* Reflects shoppers store preference.
** Less than 1%.

Metropolitan Statistical Area:
IN: Clark, Floyd, Harrison Counties
KY: Bullitt, Jefferson, Oldham, Shelby Counties

Rank in U.S. based on supermarket sales 1984: 42

| | U.S. | MSA Total | Central City Louisville |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 5,324 | $ 1,701 |
| Food Store Sales (millions) | $ 270,831 | $ 1,118 | $ 450 |
| % of total retail sales | 20.9% | 21.0% | 26.5% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,050 | $ -- |
| % of Food Store Sales | 93.6% | 94.0% | -- % |
| Total number of Food Stores | 227,219 | 868 | 410 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,084.15 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 968.5 | 286.7 |
| Total number of Households (thousands) | 86,926.6 | 353.2 | 116.1 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 6.8% | -- % |
| 25 - 34 Years | 23.1% | 24.3% | -- % |
| 35 - 44 Years | 19.0% | 19.1% | -- % |
| 45 - 54 Years | 15.0% | 15.5% | -- % |
| 55 - 64 Years | 15.5% | 15.5% | -- % |
| 65 & Over | 20.4% | 18.8% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 24.6% | -- % |
| Two | 30.6% | 29.4% | -- % |
| Three | 17.5% | 18.8% | -- % |
| Four | 15.3% | 16.0% | -- % |
| Five | 7.2% | 7.0% | -- % |
| Six & Over | 4.6% | 4.1% | -- % |
| Average Household Size | 2.74 | 2.74 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 10,185 | $ 2,799 |
| Per Capita EBI | $ 10,813 | $ 10,516 | $ 9,763 |
| Median Household EBI | $ 25,496 | $ 25,648 | $ 19,488 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 16.7% | 25.6% |
| $10,000 - $24,999 | 32.0% | 31.9% | -- % |
| $25,000 & Over | 51.0% | 51.4% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 70.1% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 65.6% | -- % |

## 43. NASHVILLE – DAVIDSON, TENNESSEE

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 66.0% | |
| Kroger | 27 | 33.0 | (Own) Nashville, TN |
| Winn-Dixie | 14 | 16.0 | (Own) Louisville, TN |
| H.G. Hill | 16 | 12.0 | (Own) Nashville, TN |
| Sunflower Food Store | 1 | 3.0 | (Own) Indianola, MS |
| Farmer's Market Warehouse | 1 | 2.0 | Kroger Warehouse, Nashville, TN |
| 7-Eleven (C) | 18 | * | Charles C. Parks, Gallatin, TN |
| Hot Stop (C) | 16 | * | Charles C. Parks, Gallatin, TN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 24.0% | |
| Bi-Rite & Food Town | 53 | 11.0 | (Own) Bi-Rite Foods, Nashville, TN |
| Big Star | 50 | 7.0 | Malone & Hyde, Nashville, TN |
| Cee Bee | 32 | 6.0 | C.B. Ragland, Nashville, TN |
| Best Way | 60 | * | Malone & Hyde, Nashville, TN |
| LEADING INDEPENDENTS: | | 1.0% | |
| Green Hill Market | 1 | 1.0 | C.B. Ragland, Nashville, TN |
| Bill Crook Food Stores | 8 | na | Malone & Hyde, Nashville, TN |
| Tidwells Super Value | 7 | na | Super Value, Anniston, AL |
| OTHER GROCERY STORES | na | 9.0% | |
| TOTAL | 304+ | 100.0% | |

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na - not available
(C) Convenience Stores
* Included in "Other Grocery Stores"

Metropolitan Statistical Area:
Cheatham, Davidson, Dickson, Robertson, Rutherford, Sumner, Williamson, Wilson Counties

Rank in U.S. based on supermarket sales 1984: 43

|  | U.S. | MSA Total | Central City Nashville-Davidson |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 5,236 | $ 3,498 |
| Food Store Sales (millions) | $ 270,831 | $ 1,076 | $ 638 |
| % of total retail sales | 20.9% | 20.6% | 18.2% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,049 | $ -- |
| % of Food Store Sales | 93.6% | 97.5% | -- % |
| Total number of Food Stores | 227,219 | 948 | 498 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,165.81 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 899.8 | 459.2 |
| Total number of Households (thousands) | 86,926.6 | 328.5 | 178.4 |
| Population by Age of Household Head |  |  |  |
| Under 25 Years | 7.0% | 7.3% | -- % |
| 25 - 34 Years | 23.1% | 24.5% | -- % |
| 35 - 44 Years | 19.0% | 20.2% | -- % |
| 45 - 54 Years | 15.0% | 15.0% | -- % |
| 55 - 64 Years | 15.5% | 14.3% | -- % |
| 65 & Over | 20.4% | 18.7% | -- % |
| Number of Persons per Household |  |  |  |
| % by number of persons per household |  |  |  |
| One | 24.8% | 22.9% | -- % |
| Two | 30.6% | 30.8% | -- % |
| Three | 17.5% | 19.4% | -- % |
| Four | 15.3% | 16.4% | -- % |
| Five | 7.2% | 6.8% | -- % |
| Six & Over | 4.6% | 3.7% | -- % |
| Average Household Size | 2.74 | 2.74 | -- |
| INCOME 1984 |  |  |  |
| Net Effective Buying Income (millions) | $2,576,533 | $ 9,832 | $ 5,204 |
| Per Capita EBI | $ 10,813 | $ 10,927 | $ 11,333 |
| Median Household EBI | $ 25,496 | $ 25,915 | $ 25,048 |
| Household by EBI Groups |  |  |  |
| % Distribution |  |  |  |
| Under $10,000 | 16.9% | 16.2% | 16.8% |
| $10,000 - $24,999 | 32.0% | 31.9% | -- % |
| $25,000 & Over | 51.0% | 52.0% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 77.2% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 65.0% | -- % |

## 44. SALT LAKE CITY—OGDEN, UTAH

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 58.0% | |
| Smith's Food King | 24 | 21.0 | (Own) Layton, UT |
| Albertson's | 26 | 16.0 | (Own) Salt Lake City, UT |
| Safeway | 31 | 15.0 | (Own) Salt Lake City, UT |
| Skaggs-Alpha Beta | 10 | 6.0 | (Own) Salt Lake City, UT |
| LEADING CONVENIENCE STORE CHAINS: | | 3.0% | |
| 7-Eleven | 52 | 3.0 | McLane-Western, Denver, CO |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 4.0% | |
| AG and Food Town | 23 | 3.0 | Assoc. Food Stores, Salt Lake City, UT |
| IGA | 14 | 1.0 | American Strevell, Salt Lake City, UT |
| LEADING INDEPENDENTS: | | 28.5% | |
| Harmon's | 6 | 11.0 | |
| Dan's | 6 | 8.0 | |
| Ream's | 9 | 7.0 | Assoc. Food Stores, Salt Lake City, UT |
| The Store | 3 | 1.0 | |
| Miniature Market | 3 | 1.0 | |
| Circle K (C) | 14 | 0.5 | |
| OTHER GROCERY STORES | 160 | 6.5% | |
| TOTAL | 381 | 100.0% | |

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(C) Convenience Stores

Metropolitan Statistical Area:
Davis, Salt Lake, Weber Counties

Rank in U.S. based on supermarket sales 1984: 44

| | U.S. | MSA Total | Central City Salt Lake City |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 4,976 | $ 1,423 |
| Food Store Sales (millions) | $ 270,831 | $ 1,093 | $ 238 |
| % of total retail sales | 20.9% | 22.0% | 16.7% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,046 | $ -- |
| % of Food Store Sales | 93.6% | 95.7% | -- % |
| Total number of Food Stores | 227,219 | 509 | 190 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,012.88 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 1,032.7 | 166.9 |
| Total number of Households (thousands) | 86,926.6 | 3[illegible].3 | 71.2 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 9.9% | -- % |
| 25 - 34 Years | 23.1% | 28.7% | -- % |
| 35 - 44 Years | 19.0% | 19.9% | -- % |
| 45 - 54 Years | 15.0% | 13.7% | -- % |
| 55 - 64 Years | 15.5% | 12.3% | -- % |
| 65 & Over | 20.4% | 15.3% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 19.1% | -- % |
| Two | 30.6% | 28.0% | -- % |
| Three | 17.5% | 17.3% | -- % |
| Four | 15.3% | 16.5% | -- % |
| Five | 7.2% | 9.9% | -- % |
| Six & Over | 4.6% | 9.1% | -- % |
| Average Household Size | 2.74 | 3.09 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 9,451 | $ 1,706 |
| Per Capita EBI | $ 10,813 | $ 9,152 | $ 10,222 |
| Median Household EBI | $ 25,496 | $ 25,768 | $ 19,178 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 13.2% | 22.5% |
| $10,000 - $24,999 | 32.0% | 34.9% | -- % |
| $25,000 & Over | 51.0% | 51.9% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 80.8% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 57.9% | -- % |

## 45. ALBANY – SCHENECTADY – TROY, NEW YORK

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 85.0% | |
| Price Chopper | 26 | 36.0 | (Own) Schenectady, NY |
| Grand Union | 27 | 23.0 | (Own) Waterford, NY |
| Albany Public Mkts. (Weis) | 10 | 8.0 | (Own) Albany, NY |
| Star Markets | 10 | 7.0 | (Own) Albany, NY |
| Trading Post/Food Circus | 9 | 7.0 | Bi-Lo, Albany, NY |
| P&C | 5 | 4.0 | (Own) Syracuse, NY |
| OTHER GROCERY STORES | na | 15.0% | |
| TOTAL | 87+ | 100.0% | |

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na – not available

Metropolitan Statistical Area:
Albany, Green, Montgomery, Rensselaer, Saratoga, Schenectady Counties

Rank in U.S. based on supermarket sales 1984: 45

| | U.S. | MSA Total | Central City Albany |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 4,652 | $ 607 |
| Food Store Sales (millions) | $ 270,831 | $ 1,079 | $ 131 |
| % of total retail sales | 20.9% | 23.2% | 21.6% |
| Supermarket Sales (millions) | $ 253,433 | $ 1,004 | $ -- |
| % of Food Store Sales | 93.6% | 93.0% | -- % |
| Total number of Food Stores | 227,219 | 739 | 135 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,162.71 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 863.5 | 101.4 |
| Total number of Households (thousands) | 86,926.6 | 319.6 | 41.7 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 6.0% | -- % |
| 25 - 34 Years | 23.1% | 21.8% | -- % |
| 35 - 44 Years | 19.0% | 17.5% | -- % |
| 45 - 54 Years | 15.0% | 14.9% | -- % |
| 55 - 64 Years | 15.5% | 16.8% | -- % |
| 65 & Over | 20.4% | 23.1% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 26.6% | -- % |
| Two | 30.6% | 30.2% | -- % |
| Three | 17.5% | 16.9% | -- % |
| Four | 15.3% | 14.8% | -- % |
| Five | 7.2% | 7.2% | -- % |
| Six & Over | 4.6% | 4.2% | -- % |
| Average Household Size | 2.74 | 2.70 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 9,709 | $ 1,116 |
| Per Capita EBI | $ 10,813 | $ 11,244 | $ 11,006 |
| Median Household EBI | $ 25,496 | $ 27,262 | $ 21,314 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 14.0% | 20.8% |
| $10,000 - $24,999 | 32.0% | 31.3% | -- % |
| $25,000 & Over | 51.0% | 54.7% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 59.1% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 50.4% | -- % |

## 46. ORLANDO, FLORIDA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 64.0% | |
| Winn-Dixie | 35 | 23.0 | (Own) Orlando, FL |
| Publix/Food World | 24 | 21.0 | (Own) Lakeland, FL |
| Food Fair | 10 | 9.0 | (Own) Jacksonville, FL |
| Albertson's | 7 | 7.0 | Super Food Services, Orlando, FL |
| 7-Eleven (C) | 63 | 2.0 | (Own) Orlando, FL |
| Fairway | 3 | 1.0 | Malone & Hyde, Miami, FL |
| A&P | 3 | 1.0 | Super Food Services, Orlando, FL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 21.2% | |
| Certified | 130 | 10.0 | (Own) Ocala, FL |
| Affiliated of Fla. | 1 | 0.2 | (Own) Tampa, FL |
| Various, supplied by Super Food Services | 14 | 11.0 | |
| OTHER GROCERY STORES | na | 14.8% | |
| TOTAL | 290+ | 100.0% | |

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(C) Convenience Stores
na - not available

Metropolitan Statistical Area:
Orange, Osceola, Seminole Counties

Rank in U.S. based on supermarket sales 1984: 46

| | U.S. | MSA Total | Central City Orlando |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 5,665 | $ 1,602 |
| Food Store Sales (millions) | $ 270,831 | $ 1,040 | $ 210 |
| % of total retail sales | 20.9% | 18.4% | 13.1% |
| Supermarket Sales (millions) | $ 253,433 | $ 982 | $ -- |
| % of Food Store Sales | 93.6% | 94.4% | -- % |
| Total number of Food Stores | 227,219 | 695 | 155 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,173.94 | $ -- % |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 836.5 | 138.5 |
| Total number of Households (thousands) | 86,926.6 | 310.4 | 53.3 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.3% | -- % |
| 25 - 34 Years | 23.1% | 22.4% | -- % |
| 35 - 44 Years | 19.0% | 19.2% | -- % |
| 45 - 54 Years | 15.0% | 15.9% | -- % |
| 55 - 64 Years | 15.5% | 15.7% | -- % |
| 65 & Over | 20.4% | 19.5% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 23.4% | -- % |
| Two | 30.6% | 33.4% | -- % |
| Three | 17.5% | 17.7% | -- % |
| Four | 15.3% | 14.8% | -- % |
| Five | 7.2% | 6.6% | -- % |
| Six & Over | 4.6% | 4.1% | -- % |
| Average Household Size | 2.74 | 2.69 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 8,935 | $ 1,454 |
| Per Capita EBI | $ 10,813 | $ 10,681 | $ 10,498 |
| Median Household EBI | $ 25,496 | $ 24,226 | $ 20,796 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 25.9% | 21.6% |
| $10,000 - $24,999 | 32.0% | 35.8% | -- % |
| $25,000 & Over | 51.0% | 48.3% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 84.7% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 54.2% | -- % |

## 47. BIRMINGHAM, ALABAMA

| Market Area Covered: Jefferson County | No. of Stores | % of Market's Grocery Store Sales** | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 66.0% | |
| Bruno's Food World and Consumer Warehouse* | 28 | 33.0 | (Own) Birmingham, AL |
| Winn-Dixie | 22 | 23.0 | (Own) Montgomery, AL |
| Western | 13 | 10.0 | Super Valu, Anniston, AL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 12.0% | |
| Food Center | 16 | 5.0 | Assoc. Groc. of Ala., Birmingham, AL |
| Food Town | 3 | 3.0 | Assoc. Groc. of Ala., Birmingham, AL |
| Food Giant | 3 | 2.0 | Assoc. Groc. of Ala., Birmingham, AL |
| Piggly Wiggly | 6 | 2.0 | Piggly Wiggly, Birmingham, AL |
| Hudd's IGA | 3 | na | na |
| LEADING INDPENDENTS: | | 3.0% | |
| Country Market | 1 | 3.0 | Warehouse Groceries, Gadsden, AL |
| Sav-Mor Warehouse Foods | 7 | na | na |
| OTHER INDEPENDENTS: | na | 19.0% | |
| TOTAL | 102+ | 100.0% | |

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na - not available

* Bruno's Food & Pharmacy and FoodMax are owned by Bruno's Food World and Consumer Warehouse

**Represents volume of groceries based on period from September 1983-July 1984.

Metropolitan Statistical Area:
Blount, Jefferson, St. Clair, Shelby, Walker Counties

Rank in U.S. based on supermarket sales 1984: 47

| | U.S. | MSA Total | Central City Birmingham |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 4,238 | $ 1,836 |
| Food Store Sales (millions) | $ 270,831 | $ 975 | $ 319 |
| % of total retail sales | 20.9% | 23.0% | 17.4% |
| Supermarket Sales (millions) | $ 253,433 | $ 947 | $ -- |
| % of Food Store Sales | 93.6% | 97.1% | -- % |
| Total number of Food Stores | 227,219 | 840 | 314 |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,034.18 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 915.7 | 282.5 |
| Total number of Households (thousands) | 86,926.6 | 342.7 | 111.9 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 6.5% | -- % |
| 25 - 34 Years | 23.1% | 23.1% | -- % |
| 35 - 44 Years | 19.0% | 18.1% | -- % |
| 45 - 54 Years | 15.0% | 15.0% | -- % |
| 55 - 64 Years | 15.5% | 15.6% | -- % |
| 65 & Over | 20.4% | 21.8% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 24.2% | -- % |
| Two | 30.6% | 30.1% | -- % |
| Three | 17.5% | 19.0% | -- % |
| Four | 15.3% | 15.7% | -- % |
| Five | 7.2% | 6.8% | -- % |
| Six & Over | 4.6% | 4.1% | -- % |
| Average Household Size | 2.74 | 2.67 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 8,704 | $ 2,387 |
| Per Capita EBI | $ 10,813 | $ 9,505 | $ 8,450 |
| Median Household EBI | $ 25,496 | $ 21,813 | $ 17,368 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 22.3% | 29.2% |
| $10,000 - $24,999 | 32.0% | 34.5% | -- % |
| $25,000 & Over | 51.0% | 43.2% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 64.1% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 55.6% | -- % |

## 48. TULSA, OKLAHOMA

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 64.0% | |
| Safeway | 28 | 31.0 | (Own) Tulsa, OK |
| Scrivner | 9 | 9.0 | (Own) Oklahoma City, OK |
| Skaggs | 6 | 8.0 | American Stores, Richardson, TX |
| Fam[illegible]y Markets | 7 | 7.0 | Griffin Grocery, Van Buren, AK |
| Sipes | 3 | 4.0 | Hale Halsell, Tulsa, OK |
| Well's Food Market | 3 | 3.0 | Fleming Food Co., Okla. City, OK |
| Humpty Dumpty (Allied) | 2 | 2.0 | (Own) Oklahoma City, OK |
| LEADING CONVENIENCE STORE CHAINS: | | 7.0% | |
| Quick-Trip | 54 | 2.0 | Affiliated Foods, Tulsa, OK |
| U-Tote-M | 55 | 2.0 | Affiliated Foods, Tulsa, OK |
| Git'N Go | 36 | 2.0 | Hale Halsell, Tulsa, OK |
| Mako | 24 | 1.0 | Affiliated Foods, Tulsa, OK |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 13.0% | |
| A-G/Thrift-T-Wise | 43 | 10.0 | Affiliated Foods, Tulsa, OK |
| IGA | 2 | 3.0 | Fleming Foods Co., Oklahoma City, OK |
| LEADING INDEPENDENTS: | | 16.0% | |
| Oertles Discount | 1 | 16.0 | na |
| Yale Discount | 1 | | na |
| Crosstown Discount | 1 | | na |
| Osage Discount | 1 | | na |
| TOTAL | 276+ | 100.0% | |

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na - not available

Metropolitan Statistical Area:
Creek, Osage, Tulsa, Rogers, Wagoner Counties

Rank in U.S. based on supermarket sales 1984: 48

| | U.S. | MSA Total | Central City Tulsa |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 4,224 | $ 3,033 |
| Food Store Sales (millions) | $ 270,831 | $ 883 | $ 535 |
| % of total retail sales | 20.9% | 20.9% | 17.6% |
| Supermarket Sales (millions) | $ 253,433 | $ 861 | $ -- |
| % of Food Store Sales | 93.6% | 97.5% | -- % |
| Total number of Food Stores | 227,219 | 597 | -- |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,166.03 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 738.4 | 374.1 |
| Total number of Households (thousands) | 86,926.6 | 281.0 | 155.2 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 8.5% | -- % |
| 25 - 34 Years | 23.1% | 24.7% | -- % |
| 35 - 44 Years | 19.0% | 19.8% | -- % |
| 45 - 54 Years | 15.0% | 14.7% | -- % |
| 55 - 64 Years | 15.5% | 14.1% | -- % |
| 65 & Over | 20.4% | 18.3% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 25.4% | -- % |
| Two | 30.6% | 31.7% | -- % |
| Three | 17.5% | 17.8% | -- % |
| Four | 15.3% | 15.7% | -- % |
| Five | 7.2% | 6.4% | -- % |
| Six & Over | 4.6% | 3.0% | -- % |
| Average Household Size | 2.74 | 2.63 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 8,330 | $ 4,680 |
| Per Capita EBI | $ 10,813 | $ 11,281 | $ 12,510 |
| Median Household EBI | $ 25,496 | $ 25,898 | $ 25,162 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 16.2% | 15.9% |
| $10,000 - $24,999 | 32.0% | 31.9% | -- % |
| $25,000 & Over | 51.0% | 51.9% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 68.7% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 49.1% | -- % |

## 49. KNOXVILLE, TENNESSEE

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| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Kroger | 14 | 40.0 | (Own) Nashville, TN |
| White Store | 24 | 20.0 | (Own) Nashville, TN |
| Winn-Dixie | 13 | 16.0 | (Own) Greenville, TN |
| Giant Food Store | 7 | 5.0 | na |
| A&P | 4 | 3.0 | (Own) Atlanta, GA |
| Food Plus | 6 | 2.0 | (Own) Atlanta, GA |
| Hop-In Food Stores | 14 | 1.0 | Pay Cash Groc., Co., Knoxville, TN |
| Convenient (C) | 14 | 1.0 | The H.J. Hackney Co., Knoxville, TN |
| Ingles | 3 | 1.0 | (Own) Swannanoa, NC |
| Weigel's (C) | 30 | 1.0 | (Own) Powell, TN |
| Bi-Lo | 2 | 0.5 | (Own) Mauldin, SC |
| Quick Stop Stores (C) | 2 | 0.2 | na |
| 7-Eleven (C) | 8 | 0.1 | na |
| Pilot Food Stores | 11 | 0.1 | na |
| Handy Dandy Food Mkts. | 6 | 0.1 | na |
| LEADING INDEPENDENTS: | | | |
| Cox & Wright Food Basket | 3 | * | na |
| Norris Food Market | 1 | * | na |
| OTHER GROCERY STORES | 226 | 9.0% | |
| TOTAL | 388 | 100.0% | |

---

(C) Convenience Stores
na - not available
* Included in "Other Grocery Stores"

Metropolitan Statistical Area:
Anderson, Blount, Grainger, Jefferson, Knox, Sevier, Union Counties

Rank in U.S. based on supermarket sales 1984: 49

| | U.S. | MSA Total | Central City Knoxville |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 3,817 | $ 1,961 |
| Food Store Sales (millions) | $ 270,831 | $ 843 | $ 339 |
| % of total retail sales | 20.9% | 22.1% | 17.3% |
| Supermarket Sales (millions) | $ 253,433 | $ 813 | $ -- |
| % of Food Store Sales | 93.6% | 96.4% | -- % |
| Total number of Food Stores | 227,219 | 273 | -- |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,374.94 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 591.3 | 173.1 |
| Total number of Households (thousands) | 86,926.6 | 224.0 | 71.4 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 7.6% | -- % |
| 25 - 34 Years | 23.1% | 22.9% | -- % |
| 35 - 44 Years | 19.0% | 19.1% | -- % |
| 45 - 54 Years | 15.0% | 14.7% | -- % |
| 55 - 64 Years | 15.5% | 15.5% | -- % |
| 65 & Over | 20.4% | 20.1% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 23.9% | -- % |
| Two | 30.6% | 31.9% | -- % |
| Three | 17.5% | 19.4% | -- % |
| Four | 15.3% | 15.7% | -- % |
| Five | 7.2% | 6.1% | -- % |
| Six & Over | 4.6% | 3.0% | -- % |
| Average Household Size | 2.74 | 2.64 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 5,776 | $ 1,655 |
| Per Capita EBI | $ 10,813 | $ 9,769 | $ 9,561 |
| Median Household EBI | $ 25,496 | $ 21,625 | $ 18,099 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 21.6% | 27.2% |
| $10,000 - $24,999 | 32.0% | 35.8% | -- % |
| $25,000 & Over | 51.0% | 42.6% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 72.5% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 61.3% | -- % |

## 50. LAS VEGAS, NEVADA

| Market Area Covered:<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 93.0% | |
| Safeway | 14 | 21.0 | Nat'l. Groc., Santa Fe Springs, CA |
| Food King | 15 | 21.0 | Certified Grocers, L.A., CA |
| Lucky | 12 | 19.0 | A.M. Lewis, Las Vegas, NV |
| Albertson's | 8 | 10.0 | Certified Grocers, L.A., CA |
| Von's Grocery | 6 | 10.0 | (Own) El Monte, CA |
| Thriftimart | 4 | 5.0 | Certified Grocers, L.A., CA |
| 7-Eleven (C) | 85 | 4.0 | A.M. Lewis, Las Vegas, NV |
| Mayfair | 1 | 1.0 | Certified Grocers, L.A., CA |
| Stop & Go (C) | 25 | 1.0 | A.M. Lewis, Las Vegas, NV |
| Circle K (C) | 11 | 1.0 | na |
| OTHER GROCERY STORES | 25 | 7.0% | |
| TOTAL | 206 | 100.0% | |

Metropolitan Statistical Area:
Clark County

Rank in U.S. based on supermarket sales 1984: 50

| | U.S. | MSA Total | Central City Las Vegas |
|---|---|---|---|
| RETAIL SALES (1984) TOTAL (millions) | $1,296,660 | $ 3,389 | $ 1,544 |
| Food Store Sales (millions) | $ 270,831 | $ 812 | $ 307 |
| % of total retail sales | 20.9% | 21.1% | 19.9% |
| Supermarket Sales (millions) | $ 253,433 | $ 776 | $ -- |
| % of Food Store Sales | 93.6% | 95.6% | -- % |
| Total number of Food Stores | 227,219 | 207 | -- |
| Supermarket Sales per capita | $ 1,063.62 | $ 1,436 | $ -- |
| POPULATION 1984 TOTAL (thousands) | 238,274.7 | 540.4 | 183.5 |
| Total number of Households (thousands) | 86,926.6 | 214.7 | 73.2 |
| Population by Age of Household Head | | | |
| Under 25 Years | 7.0% | 8.7% | -- % |
| 25 - 34 Years | 23.1% | 25.3% | -- % |
| 35 - 44 Years | 19.0% | 22.7% | -- % |
| 45 - 54 Years | 15.0% | 16.1% | -- % |
| 55 - 64 Years | 15.5% | 14.6% | -- % |
| 65 & Over | 20.4% | 12.6% | -- % |
| Number of Persons per Household | | | |
| % by number of persons per household | | | |
| One | 24.8% | 28.4% | -- % |
| Two | 30.6% | 31.5% | -- % |
| Three | 17.5% | 16.9% | -- % |
| Four | 15.3% | 13.2% | -- % |
| Five | 7.2% | 6.1% | -- % |
| Six & Over | 4.6% | 3.9% | -- % |
| Average Household Size | 2.74 | 2.52 | -- |
| INCOME 1984 | | | |
| Net Effective Buying Income (millions) | $2,576,533 | $ 6,052 | $ 2,009 |
| Per Capita EBI | $ 10,813 | $ 11,199 | $ 10,948 |
| Median Household EBI | $ 25,496 | $ 24,577 | $ 23,789 |
| Household by EBI Groups | | | |
| % Distribution | | | |
| Under $10,000 | 16.9% | 14.9% | 17.3% |
| $10,000 - $24,999 | 32.0% | 36.1% | -- % |
| $25,000 & Over | 51.0% | 49.1% | -- % |
| Projected EBI % change 1989/1984 | +65.9% | 89.4% | -- % |
| Projected average household EBI % change 1989/1984 | +55.1% | 60.5% | -- % |

# SECTION 2

# OTHER MARKETS
# RETAIL GROCERY STORE SALES BY TYPE OF ORGANIZATION
# ARRANGED BY STATE AND CITY
# INCLUDING CANADA

# ALABAMA

## FLORENCE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 42.0% | |
| Kroger | 3 | 17.0 | (Own) Nashville, TN |
| Bruno's | 1 | 10.0 | (Own) Birmingham, AL |
| Winn-Dixie | 2 | 7.0 | (Own) Montgomery, AL |
| Com Pac Food Marts (C) | 10 | 3.0 | Ragland Bros., Huntsville, AL |
| A&P | 1 | 2.0 | (Own) Atlanta, GA |
| Piggly Wiggly | 1 | 2.0 | (Own) Birmingham, AL |
| Quick Shops (C) | 5 | 1.0 | Ragland Bros., Huntsville, AL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 32.0% | |
| Shop Rite | 15 | 15.0 | Mitchell Grocery Corp., Albertville, AL |
| Big Star | 6 | 10.0 | Malone & Hyde Inc., Tupelo, MS |
| Super Valu | 1 | 5.0 | (Own) Anniston, AL |
| Food Center | 3 | 2.0 | Malone & Hyde Inc., Goodlettsville, TN |
| LEADING CONVENIENCE STORE CHAINS: | | 2.0% | |
| Zippy Mart | 6 | 2.0 | Hudson-Thompson Inc., Montgomery AL |
| OTHER GROCERY STORES | na | 24.0% | |
| TOTAL | 54+ | 100.0% | |

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(C) Convenience Stores
na - not available

# GADSDEN

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 56.0% | |
| Bruno's | 3 | 30.0 | (Own) Birmingham, AL |
| Warehouse Groceries | 2 | 14.0 | Chastain-Roberts Super Valu, Anniston, AL |
| Alterman's | 2 | 10.0 | (Own) Atlanta, GA |
| Tom Thumb Food Stores (C) | 1 | 2.0 | Crestview, FL |
| Winn-Dixie | 1 | * | (Own) Montgomery, AL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 10.0% | |
| Associated Grocers of Alabama | 2 | 10.0 | Birmingham, AL |
| LEADING INDEPENDENTS: | | 7.0% | |
| Johnson's Giant Food | 2 | 5.0 | Malone-Hyde, Tupelo, MS |
| Wood Bros., Super Saver | 1 | 2.0 | Harvey Ragland, Birmingham, AL |
| Glenco's Foodliner | 1 | * | Mitchel Grocery, Albertville, AL |
| Freeman's Food Center | 1 | * | Assoc. Grocers of Alabama, Birmingham, AL |
| Burton's Food Store | 1 | * | Assoc. Grocers of Alabama, Birmingham, AL |
| OTHER GROCERY STORES | 80 | 27.0% | |
| TOTAL | 97 | 100.0% | |

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(C) Convenience Stores
* Included in "Other Grocery Stores"

## HUNTSVILLE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 64.0% | |
| Kroger | 4 | 22.0 | (Own) Nashville,TN |
| Winn-Dixie | 7 | 15.0 | (Own) Atlanta, GA |
| Food World | 2 | 12.0 | (Own) Birmingham, AL |
| Piggly Wiggly | 2 | 8.0 | Benson Wholesale, Birmingham, AL |
| Warehouse Groceries | 1 | 5.0 | (Own) Nathen Higgens |
| Big Brothers | 2 | 2.0 | Nashville, TN |
| Lucky's | 3 | * | Alfred M. Lewis, Phoenix, AZ |
| Bruno's | 2 | * | (Own) Birmingham, AL |
| LEADING INDEPENDENTS: | | 5.0% | |
| Star Market | 1 | 3.0 | Huntsville, AL |
| J.C. Brown & Co. | 1 | 1.0 | Huntsville, AL |
| R & W Market | 1 | 1.0 | Huntsville, AL |
| OTHER GROCERY STORES | 130 | 31.0% | |
| TOTAL | 156 | 100.0% | |

## MOBILE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Delchamps | 25 | 35.0 | (Own) Mobile, AL |
| Winn-Dixie | 11 | 15.0 | (Own) Montgomery, AL |
| Food World (Bruno's) | 6 | 14.0 | (Own) Birmingham, AL |
| Greer's | 15 | 11.0 | (Own) Mobile, AL |
| A&P | 6 | 10.0 | (Own) New Orleans, LA |
| United Supermarkets | 2 | 3.0 | (Own) Pensacola, FL |
| Bruno's | 1 | 2.0 | Birmingham, AL |
| Food 4 Less | 1 | 1.0 | Geneva, AL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 1.0% | |
| IGA | | 1.0 | Graves Co., Demopolis, AL |
| LEADING INDEPENDENTS:<br>(Incl. Convenience Stores) | | 8.0% | |
| Long's Supermarket | 2 | 8.0 | Lewis Bear, Pensacola, FL |
| Sun Ray Foods | 2 | | Hudson-Thompson, Montgomery, AL |
| Foodtown | 2 | | Lewis Bear, Pensacola, FL |
| B&H Food | 2 | | Lewis Bear, Pensacola, FL |
| Naman's Supermarket | 1 | | Lewis Bear, Pensacola, FL |
| TOTAL | 77 | 100.0% | |

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* Included in "Other Grocery Stores"

## MONTGOMERY

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 37.0% | |
| Winn-Dixie | 14 | 20.0 | (Own) Montgomery, AL |
| Food World | 4 | 8.0 | (Own) Birmingham, AL |
| A&P | 3 | 5.0 | (Own) Birmingham, AL |
| Big Apple | 2 | 4.0 | Atlanta, GA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 32.0% | |
| Hudson-Thompson Stores (including: Big Bear, Super Foods) | 14 | 22.0 | Hudson-Thompson, Montgomery, AL |
| Albertson's | 1 | 8.0 | na |
| IGA | 2 | 2.0 | Demopolis, AL |
| LEADING CONVENIENCE STORE CHAINS: | | 4.0% | |
| Majik Market | 14 | 2.0 | Smyrna, GA |
| Sunshine Jr. Stores | 8 | 1.0 | Panama City, FL |
| Zippy Mart | 8 | 1.0 | Jacksonville, FL |
| OTHER GROCERY STORES | na | 27.0% | |
| TOTAL | 70+ | 100.0% | |

## TUSCALOOSA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 74.0% | |
| Piggly Wiggly | 6 | 21.0 | (Own) Memphis, TN |
| Bruno's | 4 | 14.0 | (Own) Birmingham, AL |
| Kroger | 2 | 13.0 | (Own) Memphis, TN |
| Winn-Dixie | 3 | 11.0 | (Own) Montgomery, AL |
| A&P | 1 | 8.0 | (Own) Atlanta, GA |
| Albertson's | 1 | 7.0 | (Own) Orlando, FL |
| LEADING CONVENIENCE STORE CHAINS: | | 6.5% | |
| Zippy Mart | 7 | 2.0 | Hudson-Thompson, Montgomery, AL |
| Austin's Food Store | 3 | 1.0 | Stewart King & McKenzie, Selma, AL |
| Associated Grocers | 1 | 1.0 | (Own) Birmingham, AL |
| Mr. Quick | 5 | 1.0 | Lewis Grocer Co., Indianola, MS |
| Sunshine Jr. Stores | 4 | 1.0 | Panama City, FL |
| Southern Pantry | 1 | 0.5 | Stewart King & McKenzie, Selma, AL |
| OTHER GROCERY STORES | na | 19.5% | |
| TOTAL | 38+ | 100.0% | |

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na - not available

# ALASKA

## ANCHORAGE

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 77.0% | |
| Carr's Food Centers | 8 | 40.0 | (Own) J.B. Gottstein, Anchorage, AK |
| Safeway | 6 | 32.0 | (Own) Bellevue, WA |
| D & A | 2 | 5.0 | West Coast, Tacoma, WA |
| LEADING INDEPENDENTS: | | 7.0% | |
| Foodland | 3 | 5.0 | (Own) J.B. Gottstein, Anchorage, AK |
| Prairie Market | 1 | 2.0 | (Own) J.B. Gottstein, Anchorage, AK |
| OTHER GROCERY STORES (Incl. Quik Stop and others) | 10 | 16.0% | |
| TOTAL | 30 | 100.0% | |

## FAIRBANKS

| Market Area Covered: ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 45.0% | |
| Safeway | 2 | 28.0 | (Own) Bellevue, WA |
| Foodland | 1 | 17.0 | (Own) J.B. Gottstein, Anchorage, AK |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 12.5% | |
| Southgate Hub | 1 | 7.5 | West Coast Groc., Seattle, WA |
| Northgate Hub | 1 | 5.0 | West Coast Groc., Seattle, WA |
| LEADING INDEPENDENTS: | | 33.0% | |
| Market Basket | 3 | 31.5 | West Coast Groc., Seattle, WA |
| McPeaks | 1 | 1.5 | na |
| OTHER GROCERY STORES | 18 | 9.5% | |
| TOTAL | 27 | 100.0% | |

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na - not available

# ARIZONA

## TUCSON

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 80.0% | |
| Lucky (incl. Gemco) | 17 | 25.0 | Alfred M. Lewis, Phoenix, AZ |
| Safeway | 13 | 15.0 | (Own) Phoenix, AZ |
| Arden Mayfair | 7 | 12.0 | (Own) Phoenix, AZ |
| A.J. Bayless | 9 | 12.0 | (Own) Phoenix, AZ |
| American Stores/Alpha Beta | 4 | 8.0 | Assoc. Grocers, Phoenix, AZ |
| Fry's | 9 | 8.0 | Assoc. Grocers, Phoenix, AZ |
| LEADING CONVENIENCE STORE CHAINS: | | 10.0% | |
| Circle K/U-Totem | 123 | 10.0 | Alfred M. Lewis, Phoenix, AZ |
| Lavicio's Deli-Market | 7 | * | na |
| 7-Eleven | 25 | * | Assoc. Grocers, Phoenix, AZ |
| Quick Mart | 20 | * | Assoc. Grocers, Phoenix, AZ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Associated | 7 | * | Assoc. Grocers, Phoenix, AZ |
| LEADING INDEPENDENTS: | | | |
| Del Monte Market | 2 | * | Assoc. Grocers, Phoenix, AZ |
| United Market | 1 | * | na |
| AFCO Family Market | 1 | * | na |
| El Grande | 1 | * | na |
| Warehouse Foods | 3 | * | na |
| Food Mart | 2 | * | na |
| OTHER GROCERY STORES | na | 10.0% | |
| TOTAL | 251+ | 100.0% | |

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na - not available
* Included in "Other Grocery Stores"

# ARKANSAS

## FAYETTEVILLE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 27.5% | |
| Food 4 Less | 2 | na | Bentonville, AR |
| Harps Food Stores | 2 | 9.5 | Springdale, AR |
| Safeway Stores | 1 | 9.0 | (Own) Tulsa, OK |
| Consumer's Market | 2 | 9.0 | (Own) Springfield, MO |
| Dillons | 2 | na | (Own) |
| LEADING CONVENIENCE STORE CHAINS: | | 1.0% | |
| E-Z Mart | 3 | na | Fayetteville, AR |
| 7-Eleven | 6 | 1.0 | Houston, TX |
| Hot Wheels | 3 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Griffin Groc., Co. | na | * | Van Buren, AR |
| Affiliated Food Stores | na | * | Little Rock, AR |
| LEADING INDEPENDENTS: | | 14.0% | |
| Consumer IGA | 3 | 6.0 | Fayetteville, AR |
| IGA Thiftway | 4 | 5.0 | Rogers, AR |
| Price Cutters | 1 | na | na |
| Watson | 3 | 1.0 | Hale Halsell, Tulsa, OK |
| Warehouse Markets | 2 | 2.0 | Springdale, AR |
| OTHER GROCERY STORES | na | 57.5% | |
| TOTAL | 34+ | 100.0% | |

## HOT SPRINGS

Market Area Covered:
Garland County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Safeway | 3 | na | (Own) Little Rock, AR |
| Kroger | 3 | na | (Own) Little Rock, AR |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Piggly Wiggly | 3 | na | Piggly Wiggly Operator's Warehouse, Inc., Shreveport, LA |
| LEADING INDEPENDENTS: | | | |
| Jiffee Mart (C) | 2 | na | na |
| Cooley's | 1 | na | na |
| Razorback | 2 | na | na |
| Smitty's Warehouse Foods | 1 | na | na |
| Food 4 Less | 1 | na | na |
| TOTAL | 16 | | |

---

(C) Convenience Stores
na - not available
* Included in "Other Grocery Stores"

## LITTLE ROCK-NORTH LITTLE ROCK

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 95.0% | |
| Safeway | 17 | 38.0 | (Own) Little Rock, AR/Memphis, TN |
| Kroger | 10 | 28.0 | (Own) Little Rock, AR |
| Skaggs Albertson | 3 | 13.0 | Affiliated Foods, Little Rock, AR |
| Food 4 Less | 6 | 10.0 | na |
| Food City | 1 | 6.0 | (Own) Houston, TX |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 2.5% | |
| Rand Wholesale Grocery (IGA, Circle R) | 50 | 2.5 | (Own) Little Rock, AR |
| LEADING INDEPENDENTS: | | 2.5% | |
| Misc. (Incl. 7-Eleven, U-Tote-Em & Majik Markets) | 80 | 2.5 | na |
| TOTAL | 167 | 100.0% | |

## PINE BLUFF

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 70.0% | |
| Safeway | 5 | 40.0 | (Own) Little Rock, AR |
| Kroger | 1 | 23.0 | (Own) North Little Rock, AR |
| Mad Butcher | 4 | 7.0 | (Own) Pine Bluff, AR |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 11.0% | |
| Affiliated Food Stores | 2 | 6.0 | (Own) Little Rock, AR |
| Rands | 7 | 5.0 | (Own) North Little Rock, AR |
| OTHER GROCERY STORES | na | 19.0% | |
| TOTAL | 19+ | 100.0% | |

---

na - not available

# CALIFORNIA

## BAKERSFIELD

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 68.0% | |
| Safeway | 5 | 25.0 | (Own) Santa Fe Springs |
| Vons | 5 | 10.0 | (Own) El Monte, CA |
| Albertson's | 2 | 9.0 | (Own) Fullerton, CA |
| Thriftimart | 2 | 9.0 | (Own) Smart & Final, L.A., CA |
| Gemco (Lucky) | 1 | 6.0 | (Own) Buena Park, CA |
| Alpha Beta | 3 | 5.0 | (Own) La Habra, CA |
| Mayfair | 2 | 4.0 | Cert. Groc. of California, L.A., CA |
| LEADING INDEPENDENTS: | | 20.0% | |
| Center Market | 2 | 15.0 | Cert. Groc. of California, L.A., CA |
| Disco Market | 2 | | |
| 11-C Market | 2 | | |
| Youngs | 2 | | |
| Foodtown Market | 2 | 5.0 | United Grocers, Fresno, CA |
| Green Frog Market | 1 | | |
| Cope's Foodfair | 1 | | |
| OTHER GROCERY STORES | 35 | 12.0% | |
| TOTAL | 67 | 100.0% | |

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## CHICO

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 83.0% | |
| Safeway | 3 | 26.3 | (Own) San Francisco, CA |
| Lucky | 1 | 22.8 | (Own) Sacramento, CA |
| Holiday | 2 | 13.3 | Market Wholesale, Fresno, CA |
| Shop N'Save | 2 | 20.6 | United Grocers, Sacramento,CA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| 7-Eleven | 2 | * | (Own) San Francisco, CA |
| Short Shop | 2 | * | (Own) San Francisco, CA |
| LEADING INDEPENDENTS: | | 16.8% | |
| Gold Country Markets | 1 | 8.7 | Market Wholesale, Chico, LA |
| Super Shoper Markets } Big T | 2 | 3.8 | |
| Park Ave Market } Big T | | | |
| Wentz Market | 1 | 3.3 | |
| Harvey's Market | 1 | .5 | |
| Frank's Market | 1 | .5 | |
| OTHER GROCERY STORES | na | .2% | na |
| TOTAL | 18 | 100.0% | |

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* Included in "Leading Independents"
na - not available

# FRESNO

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | na | |
| Save Mart | 13 | | Certified, Los Angeles, CA |
| Safeway | 8 | | (Own) Sacramento, CA |
| Foodland | 6 | | United Grocers, Fresno, CA |
| Von's | 5 | | (Own) Los Angeles, CA |
| Gemco/Lucky | 1 | | Lucky Stores, Sacramento, CA |
| Mayfair | 1 | | Certified, Los Angeles, CA |
| 7-Eleven (C) | 27 | | United Grocers, Fresno, CA |
| Prairie Markets | 2 | | Certified, Los Angeles, CA |
| Pak-N-Sav | 1 | | na |
| LEADING INDEPENDENTS: | | na | United Grocers, Fresno, CA |
| Gongs | 2 | | United Grocers, Fresno, CA |
| Merri Mart (Sanger) | 1 | | Market Wholesale, Fresno, CA |
| Country Boy | 1 | | United Grocers, Fresno, CA |
| Continental | 1 | | United Grocers & Mkt. Whlsl., Fresno, CA |
| Christensen's | 2 | | United Grocers, Fresno, CA |
| Farmer's Market (Sanger) | 1 | | Market Wholesale, Fresno, CA |
| Bad Boy | 1 | | United Grocers, Fresno, CA |
| Yaohan | 2 | | United Grocers, Fresno, CA |
| Food King | 2 | | na |
| Young's | 2 | | Certified Grocers & Mkt. Whlsl., Fresno, CA |
| Hestbecks | 2 | | Market Wholesales, Fresno, CA |
| Stan's Market | 1 | | United Grocers, Fresno, CA |
| McLane's | 1 | | United Grocers, Fresno, CA |
| R-N Market | 1 | | Market Wholesales, Fresno, CA |
| Pay Less Market | 1 | | United Grocers, Fresno, CA |
| L & P Market | 1 | | United Grocers, Fresno, CA |
| Shop-N-Go | 9 | | na |
| Zip-N-Go | 5 | | na |
| Thriftimart | 1 | | na |
| Hanoians | 1 | | na |
| OTHER GROCERY STORES (Mostly small convenience stores) | 526 | na | |
| TOTAL | 628 | 100.0% | |

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(C) Convenience Stores
na - not available

# MODESTO

Market Area Covered:
Metropolitan Statistical Area
(Stanislaus County)

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 76.0% | |
| New Deal (includes Jumbo) | 8 | 24.0 | (Own) Mkt. Whlsl., Modesto & Certified Grocers, L.A., CA |
| Save Mart | 8 | 18.0 | (Own) Mkt. Whlsl., Modesto Certified Grocers, L.A., CA |
| Lucky Stores/Gemco | 5 | 15.0 | (Own) San Leandro, CA |
| Raley's | 2 | 8.0 | Mkt. Whlsl., Modesto, CA |
| Food 4 Less | 2 | 5.0 | na |
| Angelo's | 2 | 4.0 | Mkt. Whlsl., Modesto & United Grocers, Sacramento, CA |
| O'Briens | 2 | 2.0 | na |
| Safeway | 1 | na | (Own) Sacramento, CA |
| Richland | 4 | na | Mkt. Whlsl., Modesto & United Grocers, Sacramento, CA |
| Albertson's | 1 | na | na |
| Quik Stop (C) | 5 | na | na |
| 7-Eleven (C) | 12 | na | na |
| Liberty Markets | 2 | na | United Grocers, Fresno & Mkt. Whlsl., Modesto, CA |
| Sam's Food City | 2 | na | United Groc., Sacramento, CA |
| Sav Mor | 2 | na | Mkt. Whlsl., Modesto, CA |
| LEADING INDEPENDENTS: | | | |
| Ray's Market | 1 | na | Market Wholesale, Modesto, CA |
| Sequoia Market | 1 | na | |
| OTHER GROCERY STORES | na | 24.0% | |
| TOTAL | 60+ | 100.0% | |

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(C) Convenience Stores
na - not available

## SALINAS

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Safeway Stores | 2 | na | (Own) Oakland, CA |
| Lucky Stores | 2 | na | (Own) San Leandro, CA |
| Alpha Beta | 2 | na | (Own) La Habra, CA |
| Nob Hill | 2 | na | Fleming, Fremont, CA |
| 7-Eleven (C) | 7 | na | McLane, Merced, CA |
| Quick Stop Market (C) | 6 | na | McLane, Merced, CA |
| LEADING INDEPENDENTS: | | | |
| Albertson's | 1 | na | Fleming Foods, Fremont, CA |
| Monte Mart | 1 | na | Albertson's, La Brea, CA |
| Star Market | 1 | na | Market Wholesale, Modesto, CA |
| Gin's Supermarket | 1 | na | United Grocers, Richmond, CA |
| Fairway Markets | 3 | na | United Grocers, Richmond, CA |
| OTHER GROCERY STORES | na | na | |
| TOTAL | 26+ | na | |

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(C) Convenience Stores
na - not available
* Included in "Other Grocery Stores"

## SAN FRANSISCO PENINSULA

| Market Area Covered: Foster City-Cupertino (Spanning parts of Santa Clara & San Mateo Counties) | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 61.0% | |
| Safeway | 17 | 22.0 | (Own) San Francisco, CA |
| Lucky | 7 | 16.0 | (Own) San Francisco, CA |
| Alpha Beta Markets | 9 | 13.0 | na |
| Brentwood Markets | 3 | 7.0 | na |
| Food Fair | 2 | 3.0 | na |
| Gemco | 3 | na | (Own) San Francisco, CA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 8.0% | |
| Co-op Markets | 4 | 8.0 | Assoc. Co-ops, Richmond, CA |
| Community Store | 1 | na | na |
| LEADING INDEPENDENTS: | | 31.0% | |
| Petrini's | 2 | 7.0 | na |
| Nob Hill | 1 | 4.0 | na |
| P.W. Super | 1 | 3.0 | na |
| Key Markets | 3 | 3.0 | na |
| Manor Market | 2 | 3.0 | na |
| QFI | 1 | 3.0 | na |
| Bell | 1 | 3.0 | na |
| Draeger's Market | 1 | 3.0 | United Groc., Richmond, CA |
| Niven's International Mkt. | 1 | 1.0 | na |
| Los Altos Midtown Market | 1 | na | na |
| Midtown Market | 1 | na | Assoc. Food Stores, Union City, CA |
| Franco's Market | 1 | na | na |
| OTHER GROCERY STORES | 60 | na | |
| TOTAL | 122 | 100.0% | |

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na - not available

## SAN MATEO

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 68.0% | |
| Safeway | 15 | 30.0 | (Own) Freemont, CA |
| Lucky | 9 | 16.0 | (Own) San Leandro, CA |
| Cala/QFI | 8 | 10.0 | United Grocer, Richmond, CA |
| Alpha Beta | 3 | 5.0 | (Own) Milpitas, CA |
| Brentwood Markets | 6 | 5.0 | Fleming |
| Albertson's | 1 | 2.0 | (Own) Dublin, CA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 1.0% | |
| Consumers Coop. of Palo Alto | | 1.0 | Palo Alto, CA |
| LEADING INDEPENDENTS: | | 21.0% | |
| Petrinis | 4 | 7.0 | na |
| Bell Markets | 2 | 2.0 | na |
| Marsh Manor | 2 | 2.0 | na |
| Key Markets | 3 | 2.0 | na |
| Westlake Food Center | 1 | 2.0 | na |
| Draegers | 1 | 1.0 | na |
| Pepper Tree | 1 | 1.0 | na |
| Stanaway | 2 | 1.0 | na |
| Food Villa | 1 | 1.0 | na |
| Trag's Market | 1 | 1.0 | na |
| Laurelwood | 1 | 1.0 | na |
| OTHER GROCERY STORES | 300 | 10.0% | |
| TOTAL | 362 | 100.0% | |

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na - not available

## SANTA BARBARA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 53.0% | |
| Safeway | 7 | 17.0 | (Own) Downey, CA |
| Lucky | 13 | 12.0 | (Own) Buena Park, CA |
| Vons | 3 | 9.0 | (Own) El Monte, CA |
| Williams Bros. | 6 | 7.0 | Certified Grocers, L.A., CA |
| Albertson's | 1 | 4.0 | (Own) Brea, CA |
| Alpha Beta | 1 | 2.0 | (Own) La Habra, CA |
| Santa Cruz | 2 | 1.0 | Certified Grocers, L.A., CA |
| Jurgensen's | 1 | 1.0 | Certified Grocers, L.A., CA |
| LEADING CONVENIENCE STORE CHAINS: | | 0.5% | |
| 7-Eleven | 16 | na | A.M. Lewis, Northridge, CA |
| Circle K | 3 | 0.5 | A.M. Lewis, Northridge, CA |
| LEADING INDEPENDENTS: | | 12.0% | |
| Nielsen's | 2 | 12.0 | Certified Grocers, L.A., CA |
| Aiello's | 1 | | |
| Chapala | 1 | | |
| Foodland | 1 | | |
| Montecito Village Grocery | 1 | | |
| OTHER GROCERY STORES | 204 | 34.5% | |
| TOTAL | 263 | 100.0% | |

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na - not available

## SANTA CRUZ

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 66.0% | |
| Safeway | 6 | 34.0 | (Own) Fremont, CA |
| Albertson's | 3 | 13.0 | (Own) San Leandro, CA |
| Alpha Beta | 2 | 8.0 | (Own) Milpitas, CA |
| Lucky | 2 | 6.0 | (Own) Fremont, CA |
| Nob Hill | 2 | 5.0 | (Own) Gilroy, CA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 8.0% | |
| Speedee/7 Eleven (C) | 10 | 3.0 | San Francisco, CA, |
| Big T Supermarkets | 2 | 2.5 | United Grocers, Richmond, CA |
| Quick Stop (C) | 8 | 1.5 | United Grocers, Richmond, CA |
| Lucky 7 (C) | 1 | 1.0 | San Francisco, CA |
| LEADING INDEPENDENTS: | | 17.0% | |
| Shoppers Corner | 1 | 5.0 | Mutual, Richmond, CA |
| De Luxe Foods | 2 | 4.0 | Kockos Bros., San Francisco, CA |
| MacDonald's | 1 | 3.0 | Mutual, Richmond, CA |
| Opal Cliffs | 1 | 2.0 | United Grocers, Richmond, CA |
| Zanotto's | 1 | 2.0 | United Grocers, Richmond, CA |
| Daylite Mkt. | 1 | 1.0 | United Grocers, Richmond, CA |
| OTHER GROCERY STORES | 51 | 9.0% | |
| TOTAL | 94 | 100.0% | |

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(C) Convenience Stores

## STOCKTON

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Don Quick | 4 | na | (Own) Stockton, CA |
| Frys | 4 | na | (Own) El Sabrante, CA |
| Centro Mart | 5 | na | Market Whlsl., Modesto, CA |
| Safeway | 4 | na | (Own) Sacramento, CA |
| Segarinis | 4 | na | United Grocers Ltd., (Bert McDonnell Div.) |
| Quick Stop (C) | 4 | na | United Grocers, Sacramento, CA |
| Food Bank | 3 | na | na |
| Save-Mart | 3 | na | United Grocers, Ltd. (Bert McDonnell Div.) |
| Lucky Stores | 2 | na | na |
| Giant | 1 | na | Market Whlsl. Modesto, CA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Market Wholesale | 14 | na | (Own) Stockton, CA |
| LEADING INDEPENDENTS: | | | |
| Big Value Market | 1 | na | United Grocers, Sacramento, CA |
| Quality Grocers | 5 | na | United Grocers, Sacramento, CA |
| Big T Supermarkets | 3 | na | na |
| OTHER GROCERY STORES | 9 | na | |
| TOTAL | 66 | na | |

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(C) Convenience Stores
na - not available

## VALLEJO

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 71.0% | |
| Safeway | 11 | 20.0 | (Own) Freemont, CA |
| Lucky | 4 | 18.0 | (Own) San Leandro, CA |
| Albertson's | 3 | 16.0 | (Own) Dublin, CA |
| Farmers | 5 | 14.0 | (Own) San Francisco, CA |
| Fry's Food Stores | 1 | 3.0 | na |
| Raley's | 1 | * | na |
| LEADING INDEPENDENTS: | | 8.0% | |
| Vallergas | 4 | 5.0 | na |
| Food Fair | 2 | 3.0 | na |
| PX @ Mare Island & Travis AFB | 2 | * | na |
| OTHER GROCERY STORES | na | 21.0% | |
| TOTAL | 33+ | 100.0% | |

# COLORADO

## COLORADO SPRINGS

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 76.0% | |
| King Soopers | 7 | 36.0 | (Own) Denver, CO |
| Safeway | 8 | 33.0 | (Own) Denver, CO |
| Albertson's | 5 | 7.0 | Western Grocers, Denver, CO |
| LEADING CONVENIENCE STORE CHAINS: | | 7.0% | |
| 7-Eleven | 50 | 5.0 | Southland Dairy, Dallas, TX |
| Kwik Way Stores | 18 | 2.0 | Assoc. Grocers, Denver, CO |
| LEADING INDEPENDENTS: | | 6.0% | |
| Simms Super | 1 | 2.0 | |
| Babe's Market | 3 | 2.0 | |
| Circle Super | 1 | | Asso. Grocers, Denver, CO |
| Black Forest Stores | 1 | 2.0 | |
| City Supers | 1 | | |
| OTHER GROCERY STORES | na | 11.0% | |
| TOTAL | 95+ | 100.0% | |

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* Included in "Other Grocery Stores"
na - not available

## DURANGO

| Market Area Covered:<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 78.0% | |
| Safeway | 2 | 46.0 | (Own) Denver, CO |
| City Market | 3 | 32.0 | Dillon Co., Grand Junction, CO |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 19.0% | |
| Associated Grocers (Shur Valu) | 2 | 19.0 | (Own) Pueblo, CO |
| OTHER GROCERY STORES | 5 | 3.0% | |
| TOTAL | 12 | 100.0% | |

## FORT COLLINS

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 48.0% | |
| King Soopers | 3 | 26.0 | (Own) Denver, CO |
| Safeway | 4 | 22.0 | Denver Assoc. Grocers, Denver, CO |
| Albertson's | 1 | na | (Own) Denver, CO |
| LEADING INDEPENDENTS: | | 16.0% | |
| Steele's Cash Market | 2 | 16.0 | Assoc. Groc. of Colo., Denver, CO |
| OTHER GROCERY STORES | na | 36.0% | |
| TOTAL | 10+ | 100.0% | |

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na - not available

## PUEBLO

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| King Soopers Discount | 2 | na | (Own) Denver, CO |
| Safeway Stores | 4 | na | (Own) Denver, CO |
| Kwik Way (C) | 19 | na | Assoc. Groc., Denver, CO |
| 7-Eleven (C) | 13 | na | na |
| Loaf N Jug (C) | 15 | na | na |
| Super Foods | 4 | na | Assoc. Groc., Denver, CO |
| Shoppin' Bag | 1 | na | Assoc. Groc., Denver, CO |
| Country Market | 1 | na | Western Groc., Denver, CO |
| LEADING INDEPENDENTS: | | | |
| So-Lo Discount | 1 | na | Assoc. Groc., Denver, CO |
| Blende Super | 1 | na | Assoc. Groc., Denver, CO |
| Chet's Super | 2 | na | Assoc. Groc., Denver, CO |
| OTHER GROCERY STORES | 30 | na | |
| TOTAL | 93 | na | |

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na - not available

# CONNECTICUT

## MERIDEN

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Food Mart | 3 | na | Sweet Life Foods, Suffield, CT |
| Stop & Shop | 3 | na | (Own) North Haven, CT |
| First National | 2 | na | (Own) Windsor Locks, CT |
| Edwards Food Warehouse | 1 | na | (Own) Burlington, MA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Cumberland Farms | 13 | na | (Own) Canton, MA |
| Food Bag | 3 | na | (Own) Kensington, CT |
| Dairy Mart | 4 | na | (Own) Enfield, CT |
| Dairy Farms | 1 | na | na |
| Wa Wa Foods | 1 | na | (Own) Wawa, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Shop Rite | 2 | na | (Own) Wakefern Food Corp., Elizabeth, NJ |
| LEADING INDEPENDENTS: | | | |
| Guido's Super | 2 | na | Assoc. Grocers |
| Barker's Market | 1 | na | Sweet Life Foods, Suffield, CT |
| Everybody's Market | 4 | na | Hamden, CT |
| East Side Market | 1 | na | na |
| Suburban Super | 1 | na | na |
| Caplan's | 1 | na | na |
| Town & Country | 1 | na | na |
| Family Food Warehouse | 1 | na | na |
| Hilltop Market | 1 | na | na |
| TOTAL | 46 | na | |

1

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na - not available

## NEW BRITAIN

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Stop & Shop | 1 | na | (Own) North Haven, CT |
| Finast/Edwards | 2 | na | na |
| Food Mart | 2 | na | Sweet Life, Suffield, CT |
| Greenfields | 2 | na | Sweet Life, Suffield, CT |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Cumberland Farms | 11 | na | New England Grocer Supply Co., Northboro, MA |
| 7-Eleven | 2 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Bozzuto's | 7 | na | Cheshire, CT |
| LEADING INDEPENDENTS: | | | |
| Shop Rite | 1 | na | E. Hartford, CT |
| Guido's | 1 | na | na |
| Food Bag | 2 | na | na |
| Sussman's | 3 | na | Bozzuto's, Cheshire, CT |
| TOTAL | 34 | na | |

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na - not available

# NEW HAVEN

| Market Area Covered:<br>County of New Haven | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 71.5% | |
| Stop & Shop | 15 | 28.0 | (Own) Boston, MA |
| First National | 7 | 12.0 | (Own) Windsor Locks, CT |
| Pathmark | 4 | 9.5 | (Own) Woodbridge, NJ |
| Waldbaum's/Food Mart | 5 | 6.5 | Sweet Life, Suffield, NJ |
| Greenfield's | 3 | 4.0 | Sweet Life, Suffield, NJ |
| Mott's Shop-Rite | 3 | 4.0 | (Own) Wakefern Food Corp., Elizabeth, NJ |
| Pegnataros | 5 | 4.0 | Springfield Sugar, Suffield, CT |
| Grand Union | 1 | 1.0 | (Own) Elmwood Park, NJ |
| A&P | 2 | 1.0 | (Own) Springfield, CT |
| Foodarama | 1 | 1.0 | (Own) Wakefern Food Corp., Elizabeth, NJ |
| Gristede Brothers | 1 | 0.5 | (Own) Bronx, NY |
| LEADING CONVENIENCE STORE CHAINS: | | 2.5% | |
| Cumberland Farms | 53 | 1.5 | Roger Williams, Providence, RI |
| Dairy Mart | 20 | na | na |
| Wa Wa Food Stores | 14 | 0.5 | Thrift-Way, Penn., Providence, RI |
| 7-Eleven | 7 | 0.5 | Roger Williams, Providence, RI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 7.0% | |
| Allied Grocers | 25 | 7.0 | (Own) Windsor, CT |
| LEADING INDEPENDENTS: | | 4.5% | |
| Everybody's Market | 9 | 9.0 | Sweetlife, Windsor Locks, CT |
| Klarides | 2 | 3.5 | Bozzuto's, Cheshire, CT |
| Central Supermarket | 2 | 1.0 | Springfield Sugar, Suffield, CT |
| Walsh's IGA | 1 | 0.5 | Bozzuto's, Cheshire, CT |
| Crown Markets | 1 | 0.5 | Springfield Sugar, Suffield, CT |
| OTHER GROCERY STORES | na | 5.5% | |
| TOTAL | 181+ | 100.0% | |

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na - not available

## NORWALK

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Grand Union | 2 | na | (Own) Mount Kisco, NY |
| Stop & Shop | 2 | na | (Own) North Haven, CT |
| Pathmark | 1 | na | (Own) Woodbridge, NJ |
| Waldbaums | 2 | na | (Own) Central Islip, NY |
| Food Emporium | 2 | na | (Own) Bronx, NY |
| Finast | 1 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| IGA | 1 | na | Bozzuto's, Cheshire, CT |
| LEADING INDEPENDENTS: | | | |
| Market Basket | 1 | na | Associated Foods, CT |
| Manos Market | 1 | na | na |
| Rowayton Market | 1 | na | Bozzuto's Cheshire, CT |
| Gregory's | 1 | na | na |
| Atlantic Meat | 1 | na | Sisk & Robotti, Stamford, CT |
| Vista Market | 1 | na | na |
| Village Market | 1 | na | na |
| Berlin Bros. | 1 | na | na |
| Tokeneke Market | 1 | na | na |
| C-Town | 1 | na | na |
| Smith Ridge Market | 1 | na | na |
| Palmer's Market | 2 | na | na |
| Stew Leonard | 1 | na | na |
| TOTAL | 25 | na | |

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na - not available

## STAMFORD

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| A&P | 5 | na | (Own) Springfield, CT |
| Finast | 3 | na | na |
| Gran Central | 5 | na | na |
| Grand Union | 4 | na | Grand Union, NY |
| Stop & Shop | 1 | na | (Own) Boston, MA |
| Gristede's | 2 | na | (Own) Bronx, NY |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Cumberland Farms | 2 | na | Canton, MA |
| LEADING INDEPENDENTS: | | | |
| Bongiornos | 1 | na | na |
| Food Mart | 3 | na | Sweet Life Foods, Suffield, CT |
| Grade "A" | 3 | na | na |
| Palmers | 2 | na | na |
| TOTAL | 31 | na | |

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na - not available

## WATERBURY

Market Area Covered:
ABC City & Retail Trading Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 58.0% | |
| Stop & Shop | 7 | 20.0 | (Own) North Haven, CT |
| Stop & Save (Warehouse Foods) | 5 | 7.0 | Sweetlife, Windsor Locks, CT |
| First National | 7 | 6.0 | (Own) Windsor Locks, CT |
| Everybody's | 4 | 6.0 | Sweetlife, Windsor Locks, CT |
| Shop Rite | 4 | 6.0 | Wakefern, Bronx, NY |
| A&P | 4 | 5.0 | (Own) Springfield, MA |
| Pathmark | 1 | 4.0 | (Own) New Jersey |
| Grand Union | 4 | 2.0 | (Own) Mt. Kisco, NY |
| Shopwell | 2 | 1.5 | (Own) Bronx, NY |
| Gristede's | 1 | 0.5 | (Own) Bronx, NY |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 14.0% | |
| A.G. | 45 | 8.0 | Allied Grocer, Windsor Locks, CT |
| IGA | 6 | 6.0 | Bozzuto, Cheshire, CT |
| LEADING INDEPENDENTS: | | 19.5% | |
| Olivers | 11 | 19.5 | AG, Windor Locks, CT |
| Anfonso's | | | Bozutto's, Cheshire, CT |
| Waterbury Beef Foodland | | | Sweetlife, Windsor Locks, CT |
| Country Grocer | | | na |
| Four Corners | | | AG, Windsor Locks, CT |
| Antonelli's | | | AG, Windsor Locks, CT |
| Anthony's | | | Bozzuto's, Cheshire, CT |
| Town Plot Supermarket | | | AG, Windsor Locks, CT |
| Pik-Kwik | | | Twin County, Linden, NY |
| WAZ's | | | na |
| OTHER GROCERY STORES | 200+ | 8.5% | |
| TOTAL | 301+ | 100.0% | |

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na - not available

# DELAWARE

## DOVER

| Market Area Covered:<br>ABC Primary Market | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 30.1% | |
| Acme | 3 | 13.0 | (Own) Baltimore, MD |
| 7-Eleven (C) | 8 | * | na |
| A&P | 2 | 10.3 | (Own) Baltimore, MD |
| Safeway | 1 | 6.8 | (Own) Landover, MD |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 47.3% | |
| IGA (B. Green) | 1 | 24.5 | B. Green & Co., Baltimore, MD |
| Warehouse Foods (B. Green) | 1 | | B. Green & Co., Baltimore, MD |
| AFB Commissary | 1 | 16.0 | (Own) Washington, DC |
| Thriftway | 1 | 6.8 | (Own) Oaks, PA |
| LEADING INDEPENDENTS: | | | |
| Marstellar's | 8 | * | P.A. & Small Co., York, PA |
| Banks Convenience Stores | 5 | * | Bridgeveille Whlsl., Bridgeville, NJ |
| Medd's | 2 | * | P.A. & Small Co., York, PA |
| OTHER GROCERY STORES | na | 22.6% | |
| TOTAL | 33+ | 100.0% | |

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* Included in "Other Grocery Stores"
(C) Convenience Stores
na - not available

# WILMINGTON

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 69.6% | |
| Acme/Super Saver | 27 | 29.5 | (Own) Philadelphia/Baltimore |
| Pathmark | 4 | 22.7 | Supermarkets General, Woodbridge, N.J. |
| Super Fresh | 5 | 9.7 | na |
| Shop 'N Sav/IGA | 3 | 4.0 | IGA |
| Shop 'N Bag | 1 | 2.4 | Frankford-Quaker Grocery Co., Phila., PA |
| Jewel-T | 2 | 1.3 | Jewel Companies |
| A&P | 17 | * | (Own) Philadelphia/Baltimore |
| Safeway | 4 | * | (Own) Landover, MD |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| 7-Eleven | 43 | * | na |
| Cumberland Farms | 14 | * | (Own) Canton, MD |
| Wa Wa | 11 | * | Thriftway Foods, King of Prussia, PA |
| Red Robin Stores | 3 | * | Supermkts. General, Woodbridge, NJ |
| AM PM Mini Market | 4 | * | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 8.7% | |
| Shop Rite | 2 | 8.7 | Wakefern Food Corp., Elizabeth, NJ |
| LEADING INDEPENDENTS: | | 13.9% | |
| Thriftway | 7 | 13.9 | (Own) Oaks, PA |
| Food Rite | 1 | * | Rite Aid Drugs, Harrisburg, PA |
| Haldas Meats | 3 | * | na |
| Hub | 1 | * | na |
| Jake's | 1 | * | na |
| Miller's | 1 | * | na |
| Jansen's | 1 | * | na |
| Bachetti Bros. Meats | 3 | * | na |
| OTHER GROCERY STORES | 220 | 7.8% | na |
| TOTAL | 378 | 100.0% | |

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na - not available
* Included in "Other Grocery Stores"

# FLORIDA

## BRADENTON

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 65.0% | |
| Winn-Dixie | 9 | 25.0 | (Own) Tampa, FL |
| Publix | 6 | 21.0 | (Own) Lakeland, FL |
| Lucky | 4 | 15.0 | (Own) Tampa, FL |
| Albertson's | 2 | 3.0 | Albertson's South Co., Orlando, FL |
| Family Mart | 1 | 1.0 | Family Center, Tampa, FL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 9.0% | |
| Affiliated of Florida | 6 | 7.0 | Affiliated of Florida, Tampa, FL |
| Foodway | 4 | 2.0 | Affiliated of Florida, Tampa, FL |
| LEADING CONVENIENCE STORE CHAINS: | | 10.0% | |
| Shop N Go | 20 | 5.0 | Certified Grocers, Ocala, FL |
| L'il General | 14 | 3.0 | Malone & Hyde, Miami, FL |
| Majik Markets | 5 | 1.0 | Certified Grocers, Ocala, FL |
| 7-Eleven | 6 | 1.0 | Southland Corp., Orlando, FL |
| OTHER GROCERY STORES | na | 16.0% | |
| TOTAL | 76+ | 100.0% | |

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na - not available

## DAYTONA BEACH

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 79.0% | |
| Publix | 15 | 25.0 | (Own) Lakeland, FL |
| Winn-Dixie | 17 | 25.0 | (Own) Orlando, FL |
| Super X | 6 | 16.0 | na |
| Albertson's | 1 | 4.0 | (Own) Orlando, FL |
| Pic N Save | 4 | 3.0 | Jacksonville, FL |
| Pantry Pride | 1 | 2.0 | (Own) Jacksonville, FL |
| Goodings (Certified) | 1 | 2.0 | (Own) Orlando, FL |
| LEADING CONVENIENCE STORE CHAINS: | | 10.5% | |
| 7-Eleven | 27 | 4.0 | (Own) Southland Corp., Orlando, FL |
| Handy Way | 30 | 3.0 | Ocala, FL |
| Jiffy | 31 | 1.5 | (Own) Miami, FL |
| Majik | 10 | 1.5 | (Own) Tampa, FL |
| Little General | 5 | 0.5 | Orlando, FL |
| LEADING INDEPENDENTS: | | | |
| Thriftway (Certified) | 3 | na | (Own) Tampa, FL |
| Metz (Certified) | 3 | na | (Own) Tampa, FL |
| Pearson's (Certified) | 3 | na | (Own) Tampa, FL |
| Wiggins Bros. | 2 | na | (Own) Lakeland, FL |
| TOTAL | 159 | * | |

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na - not available

* Does not add to 100% due to the fact that the percent of sales for certain stores was not available.

## GAINESVILLE

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 80.0% | |
| Winn-Dixie | 4 | 40.0 | (Own) Jacksonville, FL |
| Publix | 5 | 30.0 | (Own) Lakeland, FL |
| Albertson's | 1 | 10.0 | (Own) Jacksonville, FL |
| Kash & Karry | 2 | na | Geneva, AL |
| Food 4 Less | 1 | na | |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.0% | |
| Affiliated of Florida | 2 | 5.0 | Tampa, FL |
| OTHER GROCERY STORES: | | 15.0% | |
| Li'l Champ Food Stores (C) | 16 | 3.0 | (Own) Jacksonville, FL |
| Munford (C) | 15 | 2.0 | (Own) Jacksonville, FL |
| Huntley Jiffy Stores (C) | 6 | 2.0 | Palotka, FL |
| Shelton Food Stores | 1 | 1.5 | Ocala, FL |
| 7-Eleven (C) | 9 | 1.0 | Orlando, FL |
| M & H Stores (C) | 5 | 0.5 | Ocala, FL |
| Others | na | 5.0 | |
| TOTAL | 67+ | 100.0% | |

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## JACKSONVILLE

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 94.0% | |
| Winn-Dixie | 35 | 26.0 | (Own) Jacksonville, FL |
| Publix | 13 | 19.0 | (Own) Jacksonville, FL |
| Rawson | 18 | 18.0 | (Own) Jacksonville, FL |
| Huntley Jiffy (C) | 119 | 7.0 | Certified Grocers, Ocala, FL |
| Albertson's | 4 | 6.0 | Super Food, Orlando, FL |
| Lil' Champ (C) | 116 | 4.0 | Certified Grocers, Ocala, FL |
| Affiliated of Florida | 50 | 2.0 | (Own) Tampa, FL |
| Majik Markets (C) | 27 | 2.0 | Munford, Atlanta, GA |
| 7-Eleven (C) | 30 | 2.0 | Southland Corp., Orlando, FL |
| Zippy Mart (C) | 30 | 2.0 | (Own) Hickory, NC |
| Foodway Stores | 3 | 2.0 | Affiliated of Florida, Tampa, FL |
| Day-n-Nite (C) | 25 | 1.0 | Fleming, Lakeland, FL |
| Souds (IGA) | 4 | 1.0 | Higdon Grocery Co., Quincy, FL |
| Save & Pack | 2 | * | * |
| LEADING INDEPENDENTS: | | 6.0% | |
| Commissaries | 3 | 4.0 | na |
| Pic N'Save | 2 | 2.0 | (Own) Jacksonville, FL |
| TOTAL | 603+ | 100.0% | |

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(C) Convenience Stores
* Just opening in this market
na - not available

## PENSACOLA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 56.5% | |
| Delchamps | 7 | 13.0 | (Own) Mobile, AL |
| Winn-Dixie | 7 | 12.5 | (Own) Montgomery, AL |
| Food Fair (Pantry Pride) | 3 | 8.0 | (Own) Jacksonville, FL |
| Albertson's | 2 | 7.0 | Lewis Bear Co., Pensacola, FL |
| A&P | 3 | 7.0 | (Own) New Orleans, LA |
| Barnes | 11 | 6.0 | Pensacola, FL |
| Piggly Wiggly | 3 | 3.0 | Benson Wholesale, Geneva, AL |
| LEADING CONVENIENCE STORE CHAINS: | | 9.0% | |
| Li'l General | 24 | 2.5 | Lewis Bear Co., Pensacola, FL |
| Jr. Food Stores | 17 | 2.0 | na |
| Sunshine Jr. Stores | 22 | 2.0 | Panama City, FL |
| 7-Eleven | 14 | 1.0 | Baton Rouge, LA |
| Plee-Zing | 1 | na | Pensacola, FL |
| Han D Pak | 8 | 1.0 | Lewis Bear Co., Pensacola, FL |
| Tom Thumb | 1 | 0.5 | Crestview, FL |
| Pak-A-Sak | 20 | * | na |
| Magic Market | 18 | * | na |
| LEADING INDEPENDENTS: | | | |
| McVay Red & White | 2 | * | Quincy, FL |
| Red & White | 2 | * | (Own) Pensacola, FL |
| IGA | 4 | * | na |
| Warehouse Food Center | 1 | na | Jackson, MS |
| United Supermarkets | 3 | na | Lewis Bear, Pensacola, FL |
| OTHER GROCERY STORES | na | 34.5% | |
| TOTAL | 173+ | 100.0% | |

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na - not available

* Included in "Other Grocery Stores"

## SARASOTA

| Market Area Covered:<br>Greater Sarasota Market | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Publix | 18 | 62.0% | (Own) Lakeland, FL |
| Winn-Dixie | 21 | 37.0 | (Own) Tampa, FL |
| Kash n' Karry | 12 | 32.0 | (Own) Tampa, FL |
| Albertson's | 3 | 9.0 | Orlando, FL |
| Super X | 4 | 6.0 | Orlando, FL |
| TOTAL | 58 | * | |

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(C) Convenience Stores
na - not available
* Percents add to more than 100% because of multiple answers in a shopers survey.

## TALLAHASSEE

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 82.0% | |
| Publix | 4 | 35.0 | Publix Warehouse, Lakeland, FL |
| Winn-Dixie | 6 | 20.0 | W/D Warehouse, Jacksonville, FL |
| Albertson's | 2 | 15.0 | Lewis Bear, Pensacola, FL |
| Magic Markets (C) | 19 | * | (Own) Jacksonville, FL |
| Jr. Food Stores (C) | 16 | * | Panama City, FL |
| South Georgia Grocery (C) | 12 | * | Quitman, GA |
| Sing Stores | 6 | * | Higdon Grocery |
| Swanee Swifty | 12 | * | Higdon Grocery |
| Hoggly-Woggly | 3 | * | Lewis Bear, Pensacola, FL |
| Food 4 Less | 1 | * | Fleming Foods, Geneva, FL |
| LEADING INDEPENDENTS: | | 13.0% | |
| Warehouse Foods | 3 | 10.0 | Higdon Grocery |
| Blountstown Hwy. IGA | 1 | 3.0 | Higdon Grocery |
| RIO | 11 | * | Albany, GA |
| Gary's IGA | 2 | * | Higdon Grocery |
| OTHER GROCERY STORES | na | 5.0% | |
| TOTAL | 98+ | 100.0 | |

## WEST PALM BEACH

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Winn-Dixie | 35 | 43.0 | (Own) Ft. Lauderdale, FL |
| Publix | 24 | 39.0 | (Own) North Miami, FL |
| Pantry Pride Supermarkets | 5 | 6.0 | (Own) Miami, FL |
| Albertson's | 2 | 3.0 | Super Food Services, Orlando, FL |
| Li'l General (C) | 33 | * | Hill Bros., West Palm Beach, FL |
| Cumberland Farms (C) | 30 | * | na |
| 7-Eleven (C) | 33 | * | (Own) Hialeah, FL |
| National Convenience Stores (C) | 28 | * | National Convenience Stores, East Point, GA |
| OTHER GROCERY STORES | na | 9.0% | |
| TOTAL | 190+ | 100.0% | |

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(C) Convenience Stores

na - not available

* Included in "Other Grocery Stores"

# GEORGIA

## ALBANY

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 56.0% | |
| Harvey's | 5 | 15.0 | (Own) Nashville, TN |
| Kroger | 2 | 8.0 | (Own) Nashville, TN |
| Winn-Dixie | 2 | 8.0 | Winn-Dixie, Jacksonville, FL |
| A&P | 1 | 7.0 | (Own) Atlanta, GA |
| Food 4 Less | 1 | 6.0 | Geneva, AL |
| Munford (C) | 13 | 3.0 | (Own) Jacksonville, FL |
| Kwickie Food Stores (C) | 9 | 3.0 | Macon, GA |
| Sunshine Jr. Stores (C) | 7 | 2.0 | Panama City, FL |
| Georgia Warehouse Foods | 1 | 2.0 | Quincy, FL |
| South Georgia Grocery (C) | 4 | 1.0 | Quitman, GA |
| Zippy Mart (C) | 2 | 1.0 | Valdosta, GA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 15.0% | |
| Piggly Wiggly | 5 | 15.0 | (Own) Vidalia, GA |
| LEADING INDEPENDENTS: | | 5.0% | |
| RIO | 5 | 5.0 | (Own) Albany, GA |
| OTHER GROCERY STORES | na | 24.0% | |
| TOTAL | 57+ | 100.0% | |

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(C) Convenience Stores
na - not available

## COLUMBUS, GA.-ALA.

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 65.6% | |
| Piggly Wiggly | 18 | 20.0 | Southland Groc. Co., Columbus, GA |
| Winn-Dixie | 5 | 12.0 | (Own) Montgomery, AL |
| A&P | 4 | 11.0 | (Own) Atlanta, GA |
| Colonial Stores | 3 | 8.0 | Thomasville, GA |
| Big Apple Stores | 4 | 7.5 | Alterman Foods, Atlanta, GA |
| Munford (C) | 15 | 3.0 | (Own) Atlanta, GA |
| 7-Eleven (C) | 8 | 1.5 | (Own) Atlanta, GA |
| United Super | 5 | 1.0 | Southland Groc. Co., Columbus, GA |
| Sing (C) | 8 | 1.0 | Timberlake Groc. Co., Timberlake, GA |
| U-Bag-It | 2 | 0.5 | Southland Groc. Co., Columbus, GA |
| Zippy Mart | 2 | 0.1 | Hudson-Thompson, Inc., Montgomery, AL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 10.0% | |
| Thriftown | 9 | 10.0 | Assoc. Groc., College Park, GA |
| IGA | 5 | | Quincy, FL |
| Giant Value | 2 | | Assoc. Groc., College Park, GA |
| Super Foods | 3 | | (Own) Orlando, FL |
| OTHER GROCERY STORES | na | 24.4% | |
| TOTAL | 93+ | 100.0% | |

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## MACON

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 90.0% | |
| Piggly Wiggly | 15 | 45.0 | (Own) Vidalia, GA |
| Kroger | 4 | 25.0 | (Own) Atlanta, GA |
| Winn-Dixie | 2 | 10.0 | (Own) Atlanta, GA |
| Big Star & Colonial | 1 | 4.0 | (Own) Atlanta, GA |
| Family Mart | 1 | 4.0 | na |
| Big Apple | 2 | 2.0 | (Own) Atlanta, GA |
| LEADING INDEPENDENTS: | | 5.0% | |
| Food Fair | 1 | 3.0 | (Own) Macon, GA |
| J & L Super Markets | 3 | 2.0 | Macon, GA |
| OTHER GROCERY STORES (Including Convenience Stores) | 58 | 5.0% | |
| TOTAL | 87 | 100.0% | |

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(C) Convenience Stores
na - not available

# ROME

| Market Area Covered:<br>Floyd County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Red Diamond | 2 | na | Assoc. Grocers, E. Point, GA |
| Piggly Wiggly | 3 | na | (Own) Vidalia, GA |
| Big Star | 1 | na | (Own) E. Point, GA |
| Kroger | 2 | na | (Own) Atlanta, GA |
| Warehoue Grocers | 1 | na | na |
| K-Mart Food | 1 | na | na |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| E-Z | 2 | na | Munford Inc., Atlanta, GA |
| Majik Markets | 2 | na | Munford Inc., Atlanta, GA |
| LEADING INDEPENDENTS: | | | |
| Lowe's | 1 | na | J.L. Lester & Sons Inc., Rockmart, GA |
| Taylors | 1 | na | J.L. Lester & Sons Inc., Rockmart, GA |
| Thomas Food Center | 1 | na | na |
| K & J's | 1 | na | J.L. Lester & Sons Inc., Rockmart, GA |
| Lumpkin | 1 | na | na |
| Roy's Little Garden | 1 | na | na |
| Millican's Super Value | 1 | na | na |
| OTHER GROCERY STORES | 85 | na | |
| TOTAL | 106 | na | |

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na - not available

## SAVANNAH

Market Area Covered:
Metropolitan Statistical Area

|  | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: |  | 89.0% |  |
| M & M | 6 | 39.0 | Savannah, GA |
| Piggly Wiggly Carolina | 8 | 21.0 | (Own) Charleston, SC |
| Kroger | 2 | 12.0 | (Own) Atlanta, GA |
| Foodtown | 4 | 11.0 | (Own) Savannah, GA |
| Red & White | 4 | 6.0 | Wetterau, Inc., Charleston, SC |
| VOLUNTARY &/OR COOPERATIVE GROUPS: |  |  |  |
| Alexander Groc. Co. | na | na | Wholesaler (Savannah, GA) |
| LEADING INDEPENDENTS: |  | 2.0% |  |
| David's | 1 | 2.0 | Savannah, GA |
| OTHER GROCERY STORES | 35 | 9.0% |  |
| TOTAL | 60 | 100.0% |  |

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# HAWAII

## HONOLULU

Market Area Covered:
Metropolitan Statistical Area

|  | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: |  | 59.8% |  |
| Foodland (including Food Pantry, Food Warehouse and Emjay's) | 28 | 2.4 | (Own) Honolulu, HI |
| Times Super Markets | 15 | 13.8 | Certified Corp., Honolulu, HI |
| Safeway | 11 | 10.9 | (Own) Richmond, CA |
| Star Markets | 9 | 10.5 | Certified Corp., Honolulu, HI |
| Big-Way Super Markets | 3 | 2.2 | Certified Corp., Honolulu, HI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: |  |  |  |
| IGA Stores | 5 | na | Certified Corp., Honolulu, HI |
| LEADING INDEPENDENTS: |  | 7.0% |  |
| Armed Forces Commissaries | 5 | na | na |
| Daiei/Holiday Mart | 4 | 5.8 | (Own) Honolulu, HI |
| D & P Super Foods | 2 | 1.2 | (Own) Honolulu, HI |
| OTHER GROCERY STORES | 159 | 33.2% |  |
| TOTAL | 241 | 100.0% |  |

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na - not available

# IDAHO

## BOISE

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 82.7% | |
| Albertson's | 9 | 27.9 | (Own) Boise, ID |
| Smith's Food King | 6 | 19.4 | (Own) Ogden, UT |
| Buttrey's | 5 | 14.6 | (Own) Billings, MT |
| Waremart | 2 | 9.0 | na |
| M & W | 5 | 6.8 | Assoc. Grocers, Boise, ID |
| Circle K (C) | 17 | 3.0 | na |
| 7-Eleven (C) | 9 | 2.0 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 2.0% | |
| AG/Thriftway | 4 | 2.0 | (Own) A.G. Wholesale, Boise, ID |
| LEADING INDEPENDENTS: | | 9.9% | |
| D'Allessandro's | 1 | 9.9 | na |
| OTHER GROCERY STORES | na | 5.4% | |
| TOTAL | 58+ | 100.0% | |

## LEWISTON

Market Area Covered:
Lewiston/Clarkston City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 42.0% | |
| Safeway | 2 | 22.0 | (Own) Spokane, WA |
| Albertson's | 2 | 20.0 | Roundup, Spokane, WA |
| LEADING INDEPENDENTS: | | 28.0% | |
| Low Priced 3 | 3 | 6.0 | Roundup, Spokane, WA |
| Randall's Thrift | 1 | 6.0 | Roundup, Spokane, WA |
| Family Foods (Rosauer's) | 1 | 5.0 | na |
| Larry's | 1 | 4.0 | URM, Spokane, WA |
| Clarkston Heights Thrift | 1 | 3.0 | URM, Spokane, WA |
| Solo Foods | 1 | 2.0 | Roundup, Spokane, WA |
| A&B Foods | 1 | 2.0 | Roundup, Spokane, WA |
| OTHER GROCERY STORES | 25 | 30.0% | |
| TOTAL | 38 | 100.0% | |

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(C) Convenience Stores
na - not available

## MOSCOW

| Market Area Covered:<br>Moscow, Idaho-Pullman, Washington | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 56.0% | |
| Rosauers | 3 | 26.0 | (Own) Spokane, WA |
| Safeway | 2 | 20.0 | (Own) Spokane, WA |
| Tidyman's Warehouse Foods | 1 | 10.0 | West Coast Grocery, Co. Spokane, WA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 33.0% | |
| Dissmore's IGA | 1 | 14.0 | West Coast Grocery Co., Spokane, WA |
| Empire Foods | 1 | na | West Coast Grocery Co., Spokane, WA |
| Modernway (Thrift) | 1 | 8.0 | West Coast Grocery Co., Spokane, WA |
| LEADING INDEPENDENTS: | | 10.0% | |
| Pullman Warehouse Foods | 1 | 10.0 | West Coast Grocery Co., Spokane, WA |
| Finches Groceries (Pullman) | 1 | na | |
| LEADING CONVENIENCE STORE CHAINS: | | 1.0 | |
| Circle K | 2 | 0.5 | na |
| Sunset Mart | 2 | 0.5 | na |
| Zip Trip No. 9 (Moscow) | 1 | na | na |
| Deli Stop (Pullman) | 1 | na | na |
| TOTAL | 17 | 100.0% | |

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na - not available

# ILLINOIS

## BLOOMINGTON

| Market Area Covered:<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Kroger | 5 | na | (Own) St. Louis, MO |
| Jewel Food Stores | 6 | na | (Own) Champion, IL |
| Eagle Foods | 1 | na | Eagle Foods, Milan, IL |
| Aldi Foods | 1 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| IGA | 19 | na | J.M. Jones, Champaign, IL |
| United Independent | 23 | na | (Own) Chris Hoerr & Sons, East Peoria, IL |
| Cub Foods | 1 | na | J.M. Jones, Champaign, IL |
| LEADING INDEPENDENTS: | | | |
| Convenient Food Mart (Bloomington) | 2 | na | na |
| Eddie's Market (Bloomington) | 1 | na | Wayco Foods Corp., Elgrove, IL |
| Convenient Food Mart (Norma) | 1 | na | na |
| Mike's Market | 1 | na | Certified Grocers, Chicago, IL |
| Diana Foods | 1 | na | Jewel Foods, Melrose Park, IL |
| Dave's (Fairbury) | 1 | na | na |
| Clapp's (Delight) | 1 | na | na |
| Convenient Food Market (Lincoln) | 1 | na | na |
| OTHER GROCERY STORES | 116 | na | |
| TOTAL | 181 | na | |

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na - not available

## CHAMPAIGN-URBANA

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Jewel | 3 | na | (Own) Chicago, IL |
| Eagle Foods | 3 | na | (Own) Milan, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | na | |
| IGA | 4 | na | J.M. Jones Co., Inc., Champaign, IL |
| Diana Foods | 2 | na | na |
| LEADING INDEPENDENTS: | | | |
| Colonial Pantry | 4 | na | Southland Corp., Champaign, IL |
| Convenient Food Mart | 2 | | Southland Corp., Champaign, IL |
| Richards | 1 | | J.M. Jones, Champaign, IL |
| 7-Eleven | 2 | | Southland Corp., Champaign, IL |
| Valu Check | 2 | | J.M. Jones, Champaign, IL |
| White Hen Pantry | 6 | | Chris Hoerr & Sons, East Peoria, IL |
| Prospect Foods | 1 | | J.M. Jones, Champaign, IL |
| OTHER GROCERY STORES | 7 | na | |
| TOTAL | 37 | na | |

## DECATUR

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 79.2% | |
| Eisner | 4 | 24.4 | (Own) Champaign, IL |
| Eagle | 3 | 24.2 | (Own) Milan, IL |
| Kroger | 3 | 19.8 | (Own) St. Louis, MO |
| Food For Less | 1 | 9.4 | Wetterau, St. Louis, MO |
| Aldi | 1 | 1.4 | na |
| Huck's (C) | 6 | * | Martin & Bayley, Carmi, IL |
| White Hen (C) | 2 | * | Dearborn Wholesalers, Chicago, IL |
| Cloy'd (includes 1 in Oreana) | 2 | * | Chris Hoerr & Sons, East Peopria, IL |
| LEADING INDEPENDENTS: | | 5.9% | |
| Colonial IGA | 1 | 3.1 | Wetterau, St. Louis, MO |
| Kennedy's | 2 | 2.8 | J.M. Jones, Champaign, IL |
| Star Markets | 2 | * | Champaign, IL |
| OTHER GROCERY STORES | 26 | 14.9% | |
| TOTAL | 53 | 100.0% | |

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na - not available
(C) Convenience Stores
* Included in "Other Grocery Stores"

## ELGIN

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 57.0% | |
| Jewel | 4 | 23.0 | (Own) Melrose Park, IL |
| Eagle Foods | 3 | na | (Own) Milan, IL |
| 7-Eleven (C) | 11 | 5.0 | na |
| Convenience Food Marts | 4 | 3.0 | Dearborn Whlsl. Grocers, Chicago, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 3.0% | |
| IGA | 1 | 3.0 | M. Loeb & Co., Elk Grove, IL |
| LEADING INDEPENDENTS: | | 25.0% | |
| Gromer's | 1 | 17.0 | Central Grocers Corp., Franklin Park, IL |
| Dino's | 1 | 5.0 | Central Grocers Corp., Franklin Park, IL |
| Stop'N Go Foods (C) | 2 | 3.0 | Certified Grocers, Madison, WI |
| OTHER GROCERY STORES | 12 | 15.0% | |
| TOTAL | 39 | 100.0% | |

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## JOLIET

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Jewel Food | 5 | na | (Own) Melrose Park, IL |
| Eagle | 4 | na | (Own) Milan, IL |
| Dominick | 1 | na | (Own) Northlake, IL |
| Aldi | 1 | na | (Own) Batavia, IL |
| Cub | 1 | na | (Own) |
| LEADING INDEPENDENTS: | | | |
| Economy | 2 | na | na |
| Hoiotes | 1 | na | na |
| Certified | 1 | na | na |
| E-Z Pickins | 2 | na | na |
| JV Supermarket | 1 | na | na |
| OTHER GROCERY STORES | 2 | na | |
| TOTAL | 21 | na | |

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(C) Convenience Stores
na - not available

## KANKAKEE

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 88.0% | |
| Jewel Food Stores | 2 | 32.0 | (Own) Melrose Park, IL |
| Scot Lad Foods | 3 | 25.0 | (Own) Lansing, IL |
| Eagle Foods | 2 | 18.0 | (Own) Milan, IL |
| Kroger | 1 | 13.0 | (Own) St. Louis, MO |
| LEADING CONVENIENCE STORE CHAINS: | | 7.0% | |
| Convenient Food Stores | na | 7.0 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.0% | |
| Ruffini Super Value | 1 | 1.0 | na |
| Glenns Cardinal Foods | 1 | 1.0 | na |
| Herscher IGA Foodliners | 1 | 1.0 | na |
| Manteno Finer Foods | 1 | 1.0 | na |
| Momennce Finer Foods | 1 | 1.0 | na |
| TOTAL | 13+ | 100.0% | |

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## PEORIA

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 57.0% | |
| Kroger | 11 | 23.0 | (Own) St. Louis, MO & Peoria, IL |
| Eagle (Lucky Stores, Inc.) | 5 | 13.0 | (Own) Milan, IL |
| Thompson Food Basket | 8 | 11.0 | Chris Hoerr & Sons, E. Peoria, IL |
| Convenient Food Marts | 16 | 4.0 | (Own) Peoria, IL |
| Randall's | 1 | 3.0 | J.M. Jones, Champaign & Peoria, IL |
| Lowells Food Stores | 3 | 3.0 | (Own) Indianapolis, IN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 27.0% | |
| Red Fox Stores | 17 | 17.0 | Chris Hoerr & Sons, E. Peoria, IL |
| IGA (excluding Ben's) | 9 | 6.0 | J.M. Jones, Champaign & Peoria, IL |
| Cardinal | 8 | 4.0 | Wayco Foods Corp., Elk Grove, IL |
| LEADING INDEPENDENTS: | | 10.0% | |
| Ben Schwartz (IGA) | 4 | 7.0 | J.M. Jones, Champaign, & Peoria, IL |
| Mr. K's | 2 | 3.0 | J.M. Jones, Champaign, & Peoria, IL |
| OTHER GROCERY STORES | na | 6.0% | |
| TOTAL | 84+ | 100.0% | |

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na - not available

## QUINCY

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Kroger | 1 | na | (Own) St. Louis, MO |
| Randall Discount | 1 | na | J.M. Jones, Champaign, IL |
| Eagle Foods | 1 | na | (Own) Eagle Foods, MIlan, IL |
| Save U More | 1 | na | (Own) Hy-Vee, Chariton, IA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Niemann Foods No. 1 | 1 | na | J.M. Jones, Champaign, IL |
| Niemann Foods No. 2 | 1 | na | J.M. Jones, Champaign, IL |
| Niemann Foods No. 6 | 1 | na | J.M. Jones, Champaign, IL |
| SUPERETTE | | | |
| Aldi Foods | 1 | na | na |
| OTHER GROCERY STORES | 3 | na | |
| TOTAL | 11 | | |

## SPRINGFIELD

Market Area Covered:
Sangamon County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 78.0% | |
| Jewel | 4 | 23.0 | (Own) Champaign, IL |
| National | 3 | 20.0 | (Own) Rosemont, IL |
| Shop 'N Save | 3 | 17.0 | Wetterau Foods, St. Louis, MO |
| Eagle Foods | 3 | 15.0 | Rock Island, IL |
| Aldi Benner | 1 | 3.0 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 14.0% | |
| IGA | 3 | 9.0 | Wetterau Foods, St. Louis, MO |
| Red Fox | 3 | 5.0 | Chris Hoerr & Sons, E. Peoria, IL |
| LEADING INDEPENDENTS: | | 4.0% | |
| Avenue Foods | 1 | 4.0 | Chris Hoerr & Sons, E. Peoria, IL |
| Humphreys | 1 | | Chris Hoerr & Sons, E. Peoria, IL |
| OTHER GROCERY STORES | na | 4.0% | |
| TOTAL | 22 | 100.0% | |

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na - not available

# INDIANA

## ANDERSON

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 28.0% | |
| Marsh | 3 | 29.0 | (Own) Yorktown, IN |
| LEADING INDEPENDENTS: | | 61.5% | |
| Payless | 4 | 34.5 | Scot Lad, Lansing, IL |
| Eaveys | 1 | 7.0 | na |
| Mathews | 1 | 6.5 | (Own) Indianapolis, IN |
| Harvest Market | 3 | 6.5 | McMahon-Lieb Co., Anderson, IN |
| Super Six | 2 | 3.0 | McMahon-Lieb Co., Anderson, IN |
| Yanceys | 2 | 3.0 | McMahon-Lieb Co., Anderson, IN |
| Aldi Foods | 1 | 2.0 | na |
| OTHER GROCERY STORES | na | 8.5% | |
| TOTAL | 17+ | 100.0% | |

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## EVANSVILLE, IND.-KY.

Market Area Covered:
Vanderburg, Warrick, Posey
and Gibson Counties, Indiana
Henderson County, Kentucky

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 11.3% | |
| IGA | 6 | 5.7 | Wetterau Foods, Bloomington, IN |
| Key Markets | 9 | 5.6 | Creasey Co., Evansville, IN |
| LEADING INDEPENDENTS: | | 79.6% | |
| Great Scot | 4 | 23.3 | Scot Lad, Lansing, IL |
| Wesselman's | 9 | 17.4 | Creasey Co., Evansville, IN |
| Sureway | 3 | 10.9 | Malone & Hyde, Sykeston, MO |
| Schnucks/Walgreens | 2 | 10.5 | Schnucks Foods, St. Louis, MO |
| Spaldings | 6 | 6.0 | J. Winkler & Sons, Dale, IN |
| Royal | 2 | 5.8 | J. Winkler & Sons, Dale, IN |
| Jerry's | 4 | 5.7 | na |
| OTHER GROCERY STORES | 116 | 9.1% | |
| TOTAL | 161 | 100.0% | |

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na - not available

## FORT WAYNE

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 89.0% | |
| Scotts | 9 | 37.0 | Scot Lad, Inc., Lima, OH |
| Rogers | 11 | 36.0 | Food Marketing Corp., Fort Wayne, IN |
| Kroger | 4 | 16.0 | (Own) Fort Wayne, IN |
| Lynn's | 3 | * | Food Marketing Corp., Fort Wayne, IN |
| Super Value | 23 | * | Food Marketing Corp., Fort Wayne, IN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 1.0% | |
| IGA | 13 | 1.0 | Super Foods, Bellefontaine, OH |
| OTHER GROCERY STORES | na | 10.0% | |
| | 63+ | 100.0% | |

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## GARY

Market Area Covered:
Corporate City Limits

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 30.0% | |
| Eagle | 2 | 30.0 | (Own) Milan, IL |
| Jewel | 1 | | (Own) Chicago, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 60.0% | |
| Certified: | | | |
| Basics Warehouse | 3 | 13.0 | Cert. Groc. of Ill., Chicago, IL |
| Wiseway | 4 | 12.5 | |
| Save More Food Centers | 3 | 9.5 | |
| Tip Top | 1 | 6.5 | |
| Shop Rite Foods | 1 | 3.5 | |
| Candiano's | 1 | 2.0 | |
| Value Mart | 3 | na | |
| Central: | | | |
| Wilco | 2 | 13.0 | Central Grocers, Franklin Park, IL |
| Costas | 3 | | Spartan, Grand Rapids, MI |
| OTHER GROCERY STORES | na | 10.0% | |
| TOTAL | 24+ | 100.0% | |

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na - not available
* Included in "Other Grocery Stores"

## HAMMOND

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 17.0% | |
| Jewel | 5 | 17.0 | Super Valu, Plainfield, IN |
| Dominick's | 2 | | (Own) Northlake, IL |
| LEADING INDEPENDENTS: | | 65.0% | |
| Strack & Vantil | 4 | 20.0 | Central Grocers, Franklin Park, IL |
| Burgers | 4 | 16.0 | Scot Lad, Chicago, IL |
| Parkview | 3 | 9.0 | Certified, Chicago, IL |
| Ultra | 1 | 7.0 | Central Grocers, Franklin Park, IL |
| JM Foods | 2 | 5.0 | Certified, Chicago, IL |
| Sterk's | 4 | 4.0 | Certified, Chicago, IL |
| Wiseway | 1 | 4.0 | Certified, Chicago, IL |
| OTHER GROCERY STORES | na | 18.0% | |
| TOTAL | 26+ | 100.0% | |

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## MUNCIE

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING GROCERY STORES: | | 100.0% | |
| Marsh | 4 | 40.0 | (Own) Yorktown, IN |
| Ross | 4 | 34.0 | Food Marketing, Ft. Wayne, IN |
| Wise | 2 | 15.0 | White Villa Foods, Dayton, OH |
| Eaveys | 2 | 8.0 | Certified Grocers, Indianapolis, IN |
| Harvest Market | 2 | 3.0 | Allied Grocers, Indianapolis, IN |
| TOTAL | 14 | 100.0% | |

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na - not available

## SOUTH BEND

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 30.0% | |
| Kroger | 7 | 30.0 | (Own) Grand Rapids, MI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 12.0% | |
| W.W. Wilt | 3 | 7.0 | Food Marketing, Ft. Wayne, IN |
| Cira's | 3 | 5.0 | Food Marketing, Ft. Wayne, IN |
| LEADING INDEPENDENTS: | | 31.0% | |
| Martin's | 7 | 25.0 | (Own) Mishawka, IN |
| Prickett's | 1 | 5.0 | Scot Lad, Lansing, IL |
| Gruber's | 2 | 1.0 | Centrella, Franklin Park, IL |
| OTHER GROCERY STORES | na | 27.0% | |
| TOTAL | 23+ | 100.0% | |

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## TERRE HAUTE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 59.0% | |
| Kroger | 4 | 27.0 | (Own) Indianapolis, IN |
| Great Scot | 2 | 21.0 | Super Valu, Plainfield, IN |
| No Frills | 2 | 11.0 | National Tea, Indianapolis, IN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 20.0% | |
| IGA | 9 | 20.0 | Wetterau Foods, Bloomington, IL |
| OTHER GROCERY STORES | na | 21.0% | |
| TOTAL | 17+ | 100.0% | |

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na - not available

# IOWA

## CEDAR RAPIDS

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 84.0% | |
| Hy-Vee Food Stores | 7 | 44.0 | (Own) Chariton Whlsl., Chariton, IA |
| Eagle Stores | 4 | 20.0 | Eagle, Milan, IL |
| Me Too Super Markets | 4 | 12.0 | Nash Finch Co., Cedar Rapids, IA |
| Econo Foods | 2 | 8.0 | Nash Finch Co., Cedar Rapids, IA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 3.0% | |
| Barlows | 2 | 3.0 | Super Valu, Des Moines, IA |
| OTHER GROCERY STORES | 30 | 13.0% | |
| TOTAL | 49 | 100.0% | |

## DAVENPORT-ROCK ISLAND-MOLINE-EAST MOLINE

| Market Area Covered:<br>Scott County, Iowa &<br>Rock Island County, Ill. | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 90.3% | |
| Eagle Discount Supermarkets | 12 | 49.8 | Lucky Stores (Midwestern Div.), Milan, IL |
| Jewel Food Stores | 3 | 17.9 | (Own) Chicago, Il |
| County Markets | 2 | 8.0 | Super Valu, Des Moines, IA |
| Aldi Discount Foods | 4 | 6.8 | (Own) Chicago, IL |
| Geifman Food Stores | 4 | 6.8 | Nash Finch, Cedar Rapids, IA |
| Food 4 Less | 1 | 1.0 | Chris Hoerr, Peoria, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.3% | |
| Jack & Jill Stores | 3 | 1.3 | Nash Finch, Cedar Rapids, IA |
| Super Valu Stores | 3 | 1.4 | (Own) Des Moines, IA |
| Royal Blue | 4 | 1.6 | Farm House Foods, Davenport, IA |
| Convenient Stores | 9 | 1.0 | na |
| LEADING INDEPENDENTS: | | 3.3% | |
| 7-Eleven (C) | 23 | 3.3 | na |
| OTHER GROCERY STORES | 18 | 1.1% | |
| TOTAL | 86 | 100.0% | |

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(C) Convenience Stores
na - not available

## DES MOINES

| Market Area Covered:<br>Polk & Warren Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 83.0% | |
| Hy-Vee Stores | 12 | 49.0 | (Own) Chariton Whlsl., Chariton, IA |
| Dahl's Food Stores | 9 | 33.0 | Super Valu, Des Moines, IA |
| Jack & Jill Stores | 1 | 1.0 | Nash Finch, Cedar Rapids, IA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 16.0% | |
| Super Valu | 8 | 8.0 | (Own) Des Moines, IA |
| Food-4-Less | 3 | 5.0 | Erickson Petroleum Co., Minneapolis, MN |
| Sav-U-Mor | 1 | 2.0 | (Own) Chariton, IA |
| AG | 6 | 1.0 | Assoc. Grocers of Iowa Des Moines, IA |
| OTHER GROCERY STORES | 21 | 1.0% | |
| TOTAL | 61 | 100.0% | |

## DUBUQUE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 72.0% | |
| Eagle | 3 | 47.0 | (Own) Milan, IL |
| Randall's | 1 | 15.0 | Super Valu, Des Moines, IA |
| Thompson | 10 | 5.0 | Assoc. Grocers, Des Moines, IA |
| Warehouse Market | 1 | 5.0 | Nash Finch Co., Cedar Rapids, IA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 1.0% | |
| Blue Jay | 1 | 1.0 | Farm House, Davenport, IA |
| OTHER GROCERY STORES | na | 27.0% | |
| TOTAL | 17 | 100.0% | |

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na - not available

## SIOUX CITY

| Market Area Covered<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 77.0% | |
| HyVee | 2 | 29.0 | (Own) Chariton, IA |
| Sunshine | 5 | 19.0 | (Own) Sioux Falls |
| Food 4 Less | 1 | 15.0 | (Own) Minneapolis, MN |
| Fareway Stores | 2 | 14.0 | (Own) Boone, IA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Gateway Foods/IGA | 5 | 23.0 | (Own) LaCrosse, WI |
| LEADING INDEPENDENTS: | | | |
| Boulevard | 1 | | na |
| IGA | 1 | | na |
| Laurences | 1 | | na |
| Corner Stores | 1 | | Affiliated, Norfolk, NE |
| Economy Market | 1 | | Affiliated, Norfolk, NE |
| OTHER GROCERY STORES: | | | |
| Coopers | 1 | | na |
| Polaykoff's | 1 | | na |
| Harold's | 1 | | na |
| Bill's | 1 | | na |
| OTHER GROCERY STORES | 28 | | |
| TOTAL | 52 | 100.0% | |

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na - not available

## WATERLOO

| Market Area Covered<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 71.0% | |
| HyVee | 5 | 35.0 | (Own) Chariton, IA |
| Eagle | 4 | 27.0 | (Own) Luck Stores, Milan, IL |
| Food-4-Less | 1 | 7.0 | (Own) Laurens, IA |
| Aldi | 1 | 2.0 | (Own) Burlington, IA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 18.0% | |
| Super Valu | 5 | 10.0 | (Own) Des Moines, IA |
| Jack & Jill | 5 | 3.0 | Nash Finch, Cedar Rapids, IA |
| Warehouse Mart | 1 | 3.0 | Nash Finch, Cedar Rapids, IA |
| Stop 'N Shop | 2 | 2.0 | Grocery Wholesale, Des Moines, IA |
| LEADING INDEPENDENTS: | | 5.0% | |
| S & S Markets | 2 | 3.0 | Assoc. Grocers, Ankeny, IA |
| Adams Store | 1 | 2.0 | Assoc. Grocers, Ankeny, IA |
| OTHER GROCERY STORES | 55 | 6.0% | |
| TOTAL | 82 | 100.0% | |

# KANSAS

## HUTCHINSON

| Market Area Covered<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 85.0% | |
| Dillon's (incl. 7 convenience stores) | 11 | 51.0 | (Own) Hutchinson, KS |
| Warehouse Marekt | 1 | 18.0 | Nash Finch Co., Hutchinson, KS |
| Safeway | 1 | 14.0 | (Own) Kansas City, KS |
| Jack & Jill | 1 | 2.0 | Nash Finch Co., Hutchinson, KS |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.0% | |
| Risley IGA | 1 | 5.0 | Fleming Co., Wichita, KS |
| LEADING INDEPENDENTS: | | 10.0% | |
| Pic-Quick, Inc. | 8 | 7.0 | na |
| Stop'N Shop | 2 | 2.0 | na |
| Northampton General Store | 1 | 1.0 | na |
| TOTAL | 26 | 100.0% | |

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na - not available

## TOPEKA

| Market Area Covered<br>Corporate City Limits | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 47.0% | |
| Falley's | 7 | 24.0 | Asso. Grocers, Kansas City, KS |
| Dillon's | 4 | 12.0 | (Own) Hutchinson, KS |
| Safeway | 2 | 6.0 | (Own) Kansas City, MO |
| Dibbles | 3 | 5.0 | Fleming, Topeka, KS |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 37.0% | |
| IGA | 15 | 29.0 | Fleming, Topeka, KS |
| Super Saver | 7 | 8.0 | Assoc. Grocer, Kansas City, KS |
| LEADING INDEPENDENTS: | | 6.0% | |
| Suttons | 2 | 6.0 | Fleming, Topeka, KS |
| OTHER GROCERY STORES (Grocery Supply, E-Z Shops, Kwik Shops, 7-Eleven Stores) | 29 | 10.0% | |
| TOTAL | 69 | 100.0% | |

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## WICHITA

| Market Area Covered<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 57.0% | |
| Dillon's | 17 | 37.0 | (Own) Hutchinson, KS |
| Safeway | 6 | 20.0 | (Own) Kansas City, MO |
| Food Barn | 5 | na | Safeway, Kansas City, MO |
| Skaggs Alpha-Beta | 3 | na | Fleming, Wichita, KS |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 17.0% | |
| IGA | 14 | 15.0 | (Own) Fleming, Wichita, KS |
| AG | 4 | 2.0 | (Own) Wichita, KS |
| LEADING INDEPENDENTS: | | 26.0% | |
| Food 4 Less | 3 | 9.0 | Assoc. Whls. Grocers, Kansas City, KS |
| Bleier's | 2 | 2.0 | (Own) Fleming, Wichita, KS |
| Best Yet | 2 | 2.0 | Scrivner, Oklahoma City, OK |
| McConnell Commissary | 1 | 3.0 | na |
| Other | na | 10.0 | Various Suppliers |
| TOTAL | 57+ | 100.0% | |

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na - not available

# KENTUCKY

## ASHLAND

| Market Area Covered<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Kroger | 2 | na | (Own) Charleston, WV |
| Mussetter's | 1 | na | Malone & Hyde, Nicholasville, KY |
| Key Markets | 3 | na | Wetterau, Kenova, WV |
| Foodland | 6 | na | Service Whlsl. Groc. Co., Culloden, WV |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| IGA | 3 | na | W.T. Sistrunk & Co., Lexington, KY |
| LEADING INDEPENDENTS: | | | |
| Cardinal Foods | 3 | na | Cardinal Foods, Columbus, OH |
| Border's Market | 1 | na | na |
| Miller's Market | 1 | na | The Land Corp., Russell, KY |
| Super Quik | 2 | na | na |
| Save Marts (C) | 4 | na | (Own) Russell, KY |
| Wennings Market (C) | 1 | na | na |
| Gateway | 3 | na | Wetterau, Kenova, WV |
| Pic-Pac | 3 | na | Malone & Hyde, Nicholasville, KY |
| Piggly Wiggly | 2 | na | Malone & Hyde, Nicholasville, KY |
| OTHER GROCERY STORES | 32 | na | |
| TOTAL | 67 | | |

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(C) Convenience Stores
na - not available

## LEXINGTON

| Market Area Covered<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 53.7% | |
| Kroger | 11 | 30.9 | (Own) Louisville, KY |
| Winn-Dixie | 7 | 10.8 | (Own) Louisville, KY |
| Pic-Pac | 2 | 6.0 | Malone & Hyde, Lexington, KY |
| Convenience Food Markets | 27 | 6.0 | Louisville, KY |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.0% | |
| Kentucky Food Stores | 14 | 5.0 | Kentucky Foods, Lexington, KY |
| LEADING INDEPENDENTS: | | 23.8% | |
| Foodtown (incl. MRS Foodtown) | 9 | 12.8 | Lexington, KY |
| Randalls (incl. County Mkt.) | 6 | 11.0 | Super Valu, Xenia, OH |
| OTHER GROCERY STORES: | 144 | 17.5% | |
| Bestway | 2 | | Malone & Hyde, Lexington, KY |
| IGA | 5 | 17.5 | W.T. Sistrunk & Co., Charleston West, VA |
| Minit Marts | 4 | | (Own) Bowling Green, KY |
| P.D.Q. | 3 | | na |
| TOTAL | 234 | 100.0% | |

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na - not available

## OWENSBORO

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 19.0% | |
| Kroger | 3 | 13.0 | (Own) Louisville, KY |
| Winn Dixie | 1 | 6.0 | (Own) Louisville, KY |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 20.0% | |
| IGA | 5 | na | Wetterau Foods, Inc., Greenville, KY |
| Key Market | 1 | na | Creasey Co., Evansville, IN |
| LEADING INDEPENDENTS: | | 46.0% | |
| Wetzel's | 4 | 26.0 | Fed. Whlsl., El Dorado, IL |
| Wyndall's | 5 | 20.0 | Malone & Hyde, Nashville, TN |
| LEADING CONVENIENCE STORE CHAINS: | | 8.0% | |
| The Pantry | 11 | 4.0 | J.T. Davenport & Son, Sanford, NC |
| Stop N Go Foods | 6 | 2.0 | Sealts Co., Inc., Lima, OH |
| Convenient Stores | 4 | 2.0 | Louisville, KY |
| OTHER GROCERY STORES | na | 7.0% | |
| TOTAL | 40+ | 100.0% | |

# LOUISIANA

## BATON ROUGE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Winn Dixie* | 15 | na | (Own) New Orleans, LA |
| A&P | 18 | na | (Own) New Orleans, LA |
| National** | 7 | na | (Own) Harahan, LA |
| Albertson's | 3 | na | Orlando, FL |
| Schwegmann | 1 | na | New Orleans, LA |
| Warehouse Foods | 1 | na | Lafayette, LA |
| Delchamps | 6 | na | Mobile, AL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Associated Grocers | 50 | na | (Own) Baton Rouge |
| Blue Ribbon Supermarkets | 8 | na | Baton Rouge, LA |
| IGA | 3 | na | Lafayette, LA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| 7-Eleven | 56 | na | Baton Rouge, LA |
| Cracker Barrel Stores | 15 | na | Baton Rouge, LA |
| Circle K Corporation | 16 | na | Metairie, LA |
| OTHER GROCERY STORES | na | na | |
| TOTAL | 196+ | | |

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na - not available
* - includes Market Place
** - includes Super Store

### SHREVEPORT

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 62.0% | |
| Brookshire Bros. | 11 | 18.0 | (Own) Tyler, TX |
| Best-Yet | 6 | 11.0 | (Own) Oklahoma City, OK |
| Kroger | 6 | 11.0 | (Own) Dallas, TX |
| 7-Eleven (C) | 48 | 9.0 | Shreveport, LA |
| Albertson's-Southco | 2 | 7.0 | (Own) San Antonio, TX |
| Safeway | 3 | 6.0 | (Own) Dallas, TX |
| LEADING INDEPENDENTS: | 45 | 10.0% | |
| OTHER GROCERY STORES | 149 | 28.0% | |
| TOTAL | 270 | 100.0% | |

## MAINE

### BANGOR

| Market Area Covered:<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 52.0% | |
| Shop'N Save Supermarkets | 29 | 52.0 | Hannaford Bros., South Portland, ME |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 40.0% | |
| IGA Stores | 36 | 20.0 | Milliken-Tomlinson Co., S. Portland, ME |
| Associated Grocers | 190 | 17.0 | (Own) South Gardiner, ME |
| Yankee Grocers | 9 | 2.0 | Associated Grocers Co., South Gardiner, ME |
| Thriftway | 7 | 1.0 | Associated Grocers Co., South Gardiner, ME |
| LEADING INDEPENDENTS: | | 2.0% | |
| Giguere's Super Discount | 3 | 2.0 | Various Suppliers |
| OTHER GROCERY STORES | 415 | 6.0% | |
| TOTAL | 689 | 100.0% | |

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(C) Convenience Stores

## PORTLAND

| Market Area Covered:<br>Cumberland, Westbrook, etc. | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 65.1% | |
| Shaw's Supermarkets | 8 | 34.5 | (Own) Brockton, MA |
| Hannaford/Shop'N Save | 8 | 30.6 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 3.3% | |
| Arther Compton's IGA | 1 | 1.1 | (Own) Milliken-Tomlinson Co., (subsidiary of Wetterau, Inc., Portland, ME) |
| Paul's Food Centers | 2 | 1.2 | na |
| Hi-Lo/Giguere's | 1 | 1.0 | na |
| LEADING INDEPENDENTS: | | 23.0% | |
| Martin's | 6 | 16.0 | Hannaford Bros., Portland, ME |
| Cottle's | 1 | 4.0 | Hannaford Bros., Portland, ME |
| Cummings Bros. | 18 | 3.0 | Hannaford Bros., Portland, ME |
| OTHER GROCERY STORES | na | 8.6% | |
| TOTAL | 45+ | 100.0% | |

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na - not available

# MARYLAND

## CUMBERLAND

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| A&P | 6 | na | (Own) Baltimore, MD |
| Safeway | 1 | na | (Own) Landover, MD |
| Acme | 2 | na | (Own) Philadelphia, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Economy Grocers | 56 | na | (Own) Cumberland, MD |
| Independent Grocers | 5 | na | Reeves Parvin, Huntingdon, PA |
| LEDING INDEPENDENTS: | | | |
| Tommy's Market | 1 | na | Fox Grocery Co., Belle Vernon, PA |
| Davis Supermarket | 1 | na | (Own) Greensburg, PA |
| Browning's | 2 | na | Fox Grocery Co., Belle Vernon, PA |
| Foodland | 1 | na | Fox Grocery Co., Belle Vernon, PA |
| Country Market | 1 | na | Super Valu, Greensburg, PA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Sheetz Kwik Shoppers | 5 | na | Economy Wholesale Grocers, Altoona, PA |
| High's Dairy Stores | 6 | na | Creasey Co., Laurel, MD |
| Dairy Mart | 2 | na | na |
| OTHER GROCERY STORES | 37 | | |
| TOTAL | 126 | | |

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na - not available

## HAGERSTOWN

| Market Area Covered: ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Martin's | 3 | na | Giant Food, Carlisle, PA |
| A&P | 2 | na | (Own) Baltimore, MD |
| Weis | 2 | na | (Own) Sunbury, PA |
| 7-Eleven (C) | 4 | na | M. Loeb Corp., Landover, MD |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Key Markets | 4 | na | Creasey Co., Hagerstown, MD |
| Old Orchard Supermarket | 1 | na | Creasey Co., Hagerstown, MD |
| Community Supermarket | 1 | na | Creasey Co., Hagerstown, MD |
| Long Meadow Supermarket | 1 | na | Creasey Co., Hagerstown, MD |
| LEADING INDEPENDENTS: | | | |
| Sunnyway Food Stores | 1 | na | Various |
| Rocky Ridge Farm Market | 1 | na | Creasey Co., Hagerstown, MD |
| Towne & Country Foodland | 1 | na | Fox Groc. Co., Belle Vernon, PA |
| TOTAL | 24 | | |

## SALISBURY

| Market Area Covered: ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Shore Stop (C) | 13 | na | Salisbury, MD |
| A&P | 2 | na | (Own) Baltimore, MD |
| Acme | 1 | na | (Own) Philadelphia, PA |
| Safeway | 2 | na | (Own) Landover, MD |
| Warehouse Food Market | 1 | na | B. Green & Co., Baltimore, MD |
| Meatland | 1 | na | Camellia, Norfolk, VA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| IGA | 2 | na | B. Green & Co., Baltimore, MD |
| TOTAL | 22 | | |

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(C) Convenience Stores
na - not available

# MASSACHUSETTS

## BROCKTON

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 60.0% | |
| Angelo's/Curtis | 30 | 17.0 | (Own) Rockland, MA |
| Shaws | 4 | 11.0 | (Own) East Bridgewater, MA |
| Stop & Shop | 5 | 10.0 | (Own) Boston, MA |
| Purity Supreme | 3 | 7.0 | (Own) North Billerica, MA |
| Fernandes | 4 | 5.0 | New England Grocer Supply, Northborough, MA |
| Star Markets | 2 | 4.0 | (Own) Cambridge, MA |
| Christy's (C) | 18 | 2.0 | Roger Williams Co., Cumberland, RI |
| A&P | 3 | 2.0 | (Own) Springfield, MA |
| Morse's Food Marts | 1 | 2.0 | (Own) Canton, MA |
| Valve Land | 2 | * | na |
| LEADING INDEPENDENTS: | | 3.0% | |
| Roxies | 1 | * | na |
| Trucchis | 2 | * | na |
| Cumberland Farms (C) | 27 | 3.0 | (Own) Canton,MA |
| OTHER GROCERY STORES | 31 | 37.0% | |
| TOTAL | 133 | 100.0% | |

## LOWELL

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| DeMoulas-Market Basket | 8 | na | (Own) Tewksbury, MA |
| Purity-Supreme-Heartland | 4 | na | (Own) Chelmsford, MA |
| Alexanders | 3 | na | Buy-Rite, Manchester, NH |
| LEADING INDEPENDENTS: | | | |
| Lowell Provision Co. | 1 | na | na |
| Shurfine Market | 1 | na | Assoc. Grocers |
| Flynn's Market | 1 | na | na |
| Ayotte's | 1 | na | na |
| Lil Peach (C) | 1 | na | na |
| TOTAL | 20 | | |

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* Included in "Other Grocery Stores"
(C) Convenience Stores
na - not available

# LYNN

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Stop & Shop | 5 | na | (Own) Boston, MA |
| Star Markets | 4 | na | (Own) Cambridge, MA |
| Purity Supreme | 3 | na | (Own) North Billerica, MA |
| DeMoulas Super Market | 1 | na | Danvers |
| Heartland Warehouse Markets | 1 | na | Salem, MA; Purity Supreme Inc., Cambridge, MA |
| LEADING INDEPENDENTS: | | | |
| Cumberland Farms (C) | 6 | na | (Own) Canton, MA |
| Convenient Food Marts | 3 | na | Lynn, Peabody, Saugus |
| Gloria Food Stores | 3 | na | Lynn, Peabody, |
| Richdale Stores (C) | 20 | na | West-Lynn Creamery, Lynn, MA |
| Bovardi's Super Markets | 1 | na | Lynn |
| Cerretani's Super Markets | 1 | na | Revere |
| Mayflower Markets | 1 | na | West Lynn Creamery, Lynn, MA |
| Frank T. Howard Corp. | 1 | na | Lynn |
| White Hen Pantry (C) | 3 | na | Lynn, Marblehead, Swampscott |
| Ernie's Market | 1 | na | Lynn |
| Franklin Super Market | 1 | na | Lynn |
| OTHER GROCERY STORES | na | | |
| TOTAL | 55+ | | |

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(C) Convenience Stores
na - not available

## NEW BEDFORD

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 79.6% | |
| Shaw's Supermarkets | 5 | 17.5 | (Own) E. Bridgewater, MA |
| Almacs | 9 | 17.3 | (Own) E. Providence, RI |
| Stop & Shop | 7 | 15.0 | (Own) Boston, MA |
| Morse's Food Marts | 6 | 10.9 | (Own) Canton, MA |
| Fernandes Super Markets | 7 | 9.1 | New England Groc. Supply, Northborough, MA |
| Purity/Heartland | 1 | 8.3 | Purity Supreme, N. Billerica, MA |
| Star Market | 1 | 1.5 | (Own) Cambridge, MA |
| LEADING INDEPENDENTS: | | 4.0% | |
| Cumberland Farms | 47 | 4.0 | (Own) Canton, MA |
| OTHER GROCERY STORES: | | 16.4% | |
| Trucchi's | 7 | 16.4 | |
| Scott's/Valueland | | | |
| Grand Central | | | |
| TOTAL | 90 | 100.0% | |

## PITTSFIELD

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 67.4% | |
| Big Y | 5 | 30.0 | na |
| Price Chopper | 6 | 26.0 | (Own) Schenectady, N.Y. |
| A&P | 1 | 4.1 | Super Food Services, Syracuse, N.Y. |
| Stop & Shop** | 1 | 3.4 | (Own) Boston, MA |
| First National Supermarkets | 1 | 2.6 | (Own) E. Hartford, CT |
| Cumberland Farms (C) | 7 | 1.3 | (Own) Canton, MA |
| LEADING INDEPENDENTS: | | | |
| Quality Food Markets | 4 | * | na |
| Harry's Supermarket | 1 | * | na |
| Loeb's (in Lenox) | 1 | * | na |
| Simon's Market Basket | 1 | * | na |
| A-Mart | 1 | * | na |
| Palmer's Community Market | 1 | * | na |
| OCO Convenience Plus | 1 | * | na |
| OTHER GROCERY STORES | na | 32.6% | |
| TOTAL | 27+ | 100.0% | |

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(C) Convenience Stores

na - not available

* Included in "Other Grocery Stores"

** With new shop to open by end of year.

## SPRINGFIELD

| Market Area Covered:<br>Metrpolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 78.5% | |
| Big Y | 17 | 16.8 | Springfield Sugar, Suffield, CT |
| Stop & Shop | 7 | 15.8 | (Own) Boston, MA |
| Food Mart | 8 | 10.0 | Springfield Sugar, Suffield, CT |
| Mott's Shop Rite | 6 | 9.7 | (Own) Wakefern, Elizabeth, NJ |
| Price Chopper | 8 | 9.0 | (Own) Schenectady, NY |
| Adams Supermarkets | 8 | 8.0 | na |
| First National | 2 | 4.8 | (Own) E. Hartford, CT |
| A&P | 7 | 3.9 | (Own) Springfield, MA |
| Grand Union | 2 | 0.5 | (Own) Waterford, NY |
| Food Basket | 7 | na | Cross Co. |
| Bi-Lo | 2 | na | Springfield Sugar, Suffield, CT |
| Edwards | 2 | na | (Own) E. Hartford, CT |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Super Valu | 4 | * | na |
| LEADING INDPENDENTS: | | | |
| Mini Food Baskets (C) | 8 | * | na |
| Open Pantry (C) | 9 | * | na |
| 7-Eleven (C) | 8 | * | na |
| OTHER GROCERY STORES | na | 21.5% | |
| TOTAL | 105+ | 100.0% | |

* Included in "Other Grocery Stores"
(C) Convenience Stores
na - not available

## WORCESTER

| Market Area Covered: Worcester County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 83.0% | |
| Big Discount | 10 | 21.0 | C&S Whols. Groc., Brattleboro, VT |
| Iandoli's | 17 | 20.5 | (Own) Worcester, MA |
| Victory Markets | 9 | 9.4 | Sweet Life Foods, Northboro, MA |
| DeMoulas | 3 | 6.9 | (Own) Chelmsford, MA |
| Cumberland Farms (C) | 51 | 6.4 | (Own) Westboro, MA |
| Stop & Shop | 4 | 6.4 | (Own) Boston, MA |
| Honey Farms (Iandoli's) (C) | 42 | 5.1 | (Own) Worcester, MA |
| Coretti's | 4 | 3.3 | Sweet Life Foods, Northboro, MA |
| Purity/Heartland | 1 | 3.0 | (Own) N. Billerica, MA |
| Almac's | 1 | 1.0 | (Own) Providence, RI |
| LEADING INDEPENDENTS: | | 5.0% | |
| Julio's | 3 | 2.4 | Sweet Life Foods, Northboro, MA |
| Fortin's | 1 | 1.6 | Sweet Life Foods, Northboro, MA |
| Hodes | 1 | 1.0 | Sweet Life Foods, Northboro, MA |
| OTHER GROCERY STORES | 213 | 12.0% | |
| TOTAL | 360 | 100.0% | |

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## MICHIGAN

### BATTLE CREEK

| Market Area Covered: ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 96.6% | |
| Felpausch | 4 | 40.2 | Spartan, Grand Rapids, MI |
| Meijer | 1 | 25.8 | (Own) Grand Rapids, MI |
| Jewel Foods | 1 | 5.2 | (Own) Chicago, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 1.3% | |
| Spartan Stores | 3 | 1.3 | Grand Rapids, MI |
| OTHER GROCERY STORES | na | 2.1% | |
| TOTAL | 9+ | 100.0% | |

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(C) Convenience Stores
na - not available

## BAY CITY

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 44.8% | |
| Kroger | 2 | 19.0 | (Own) Livonia, MI |
| Ray's Food Fair | 4 | 15.4 | Bay City Milling, Bay City, MI |
| A&P | 1 | 7.4 | (Own) Detroit, MI |
| Vescio's | 1 | 3.0 | Super Foods, Saginaw, MI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 48.0% | |
| Bay City Milling | 27 | 30.7 | (Own) Bay City, MI |
| IGA | 6 | 10.6 | Super Food Service, Vassar, MI |
| Spartan | 1 | 6.7 | (Own) Grand Rapids, MI |
| OTHER GROCERY STORES | na | 7.2% | |
| TOTAL | 42+ | 100.0% | |

## BENTON HARBOR

| Market Area Covered: ABC-Primary Market Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 8.5% | |
| Meijer | 1 | 4.5 | (Own) Grand Rapids, MI |
| Jewel | 1 | 4.0 | (Own) Chicago, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 34.3% | |
| Spartan | 22 | 30.1 | (Own) Grand Rapids, MI |
| Certified Grocers | 4 | 4.2 | (Own) Chicago, IL |
| LEADING INDEPENDENTS: | | 12.2% | |
| Super Valu | 4 | 5.4 | FMC-Ft. Wayne, IN |
| Wilts | 2 | 3.0 | FMC-Ft. Wayne, IN |
| Buy Low | 1 | 2.0 | Scot Lad, Lansing, IL |
| IGA | 3 | 1.3 | Super Food, Vassar, MI |
| Thriftway | 1 | 0.5 | Viking, Muskegon, MI |
| OTHER GROCERY STORES | na | 45.0% | |
| TOTAL | 39+ | 100.0% | |

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na - not available

## FLINT

| Market Area Covered:<br>Genesee County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 57.2% | |
| Hamady | 19 | 23.5 | Detroit, MI |
| Meijer | 3 | 12.4 | Grand Rapids, MI |
| Kessel | 5 | 11.7 | (Own) Saginaw, MI |
| Sunshine | 44 | 5.5 | Burton, MI |
| A&P | 3 | 4.1 | (Own) Detroit, MI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 17.2% | |
| Spartan | 18 | 17.2 | Grand Rapids, MI |
| LEADING INDEPENDENTS: | | 3.1% | |
| IGA | 5 | 3.1 | Vassar, MI |
| OTHER GROCERY STORES | na | 22.5% | |
| TOTAL | 97+ | 100.0% | |

## GRAND RAPIDS

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 42.5% | |
| Meijers | 10 | 31.5 | (Own) Grand Rapids & Lansing, MI |
| Eberhards | 9 | 8.3 | Scot Lad Foods, Chicago, IL |
| Stop-N-Go (C) | 23 | 1.5 | Abner Wolf Co., Detroit, MI |
| 7-Eleven (C) | 12 | 0.8 | na |
| Majik (C) | 6 | 0.4 | Abraham & Sons, Grand Rapids, MI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 54.9% | |
| Spartan | 88 | 52.9 | Spartan Stores, Inc. Grand Rapids, MI |
| Viking | 8 | 2.0 | Viking Food Stores, Inc., Muskegon, MI |
| OTHER GROCERY STORES | na | 2.6% | |
| TOTAL | 156+ | 100.0% | |

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na - not available
(C) Convenience Stores

## JACKSON

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 70.0% | |
| Kroger's | 2 | 23.0 | (Own) Livonia, MI |
| Meijer's Thrifty Acres | 1 | 20.0 | (Own) Grand Rapids, MI |
| Polly's | 4 | 19.0 | F.M.C., Fort Wayne, IN |
| Jewel/Osco | 1 | 8.0 | (Own) Melrose Park, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 18.0% | |
| IGA | 4 | 18.0 | Super Food Service, Vassar, MI |
| OTHER GROCERY STORES | na | 12.0% | |
| TOTAL | 12+ | 100.0% | |

## LANSING

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 58.3% | |
| Meijers | 4 | 30.6 | (Own) Grand Rapids, MI |
| Kroger | 5 | 21.8 | Detroit, MI |
| Eberhards | 4 | 5.9 | (Own) Grand Rapids, MI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 28.2% | |
| Shop-Rite | 11 | 22.5 | Spartan, Grand Rapids, MI |
| Goff | 3 | 5.7 | Spartan, Grand Rapids, MI |
| LEADING INDEPENEDENTS: | | 10.5% | |
| Schmidt's | 5 | 10.5 | Assoc. Grocers, Holt, MI |
| OTHER GROCERY STORES | na | 3.0% | Lansing, MI |
| TOTAL | 32+ | 100.0% | |

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na - not available

## MUSKEGON-MUSKEGON HEIGHTS

| Market Area Covered: Muskegon County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 89.6% | |
| Eberhard | 4 | 20.0 | Scot Lad Foods, Chicago, IL |
| Plumbs | 8 | 18.0 | Spartan Stores, Grand Rapids, MI |
| Meijer | 1 | 14.8 | (Own) Grand Rapids, MI |
| Thrif-T | 5 | 14.6 | Viking (Viking Store Corp.), Muskegon, MI |
| Thriftway | 11 | 13.6 | Viking (Viking Store Corp.), Muskegon, MI |
| Family Food | 1 | 6.6 | Spartan Stores, Grand Rapids, MI |
| D&W Food | 1 | 2.0 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 2.3% | |
| IGA | 2 | 2.3 | Carpenter Cook Co., Menominee, MI |
| OTHER GROCERY STORES | na | 8.1% | |
| TOTAL | 33+ | 100.0% | |

## OWOSSO

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Kessel | 1 | na | Flint, MI |
| Sunshine Stores | 2 | na | Burton, MI |
| Hutch's Family Store | 1 | na | Caro, MI |
| Hamady | 1 | na | Flint, MI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Foodland | 3 | na | Bay City Milling, Bay City, MI |
| IGA | 1 | na | Super Food Svce.Lansing, MI |
| LEADING INDEPENDENTS: | | | |
| Greenwood | 1 | na | Assorted Suppliers |
| Harrands | 1 | na | |
| The Butcher Block | 1 | na | |
| Joe's Store | 1 | na | |
| Quick-Serve Market | 1 | na | |
| Spaniola's Grocery | 1 | na | |
| Little Giant | 1 | na | |
| Gas n Go | 1 | na | |
| Main Mart | 1 | na | |
| Quick Check | 1 | na | |
| Short Stop | 1 | na | |
| Greg & Lou's | 1 | na | |
| Paulee K's Stop & Shop | 2 | na | |
| OTHER GROCERY STORES: | | | |
| Pantry Shelf | 1 | na | Assorted Suppliers |
| Maron's | 1 | na | |
| TOTAL | 24 | | |

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na - not available

## PONTIAC

| Market Area Covered:<br>North Oakland County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| A&P | 10 | na | (Own) Detroit, MI |
| Kroger's | 9 | na | Foodland, Livonia, MI |
| Great Scott Super Markets | 2 | na | Abner Wolf, Detroit, MI |
| Farmer Jack | 8 | na | Borman, Inc., Detroit, MI |
| Chatham | 2 | na | na |
| LEADING INDEPENDENTS: | | | |
| Foodtown | 4 | na | Food Marketing, Ft. Wayne, IN |
| Atlas-Foodland | 2 | na | Spartan, Grand Rapids, MI |
| Felice Quality Market | 1 | na | Central Grocery, Flint, MI |
| LaRose | 1 | na | Spartan, Grand Rapids, MI |
| Bazely's Food Market | 2 | na | (Own) Williamston, MI |
| Hiland IGA | 3 | na | IGA, Flint, MI |
| OTHER GROCERY STORES | | | |
| Breen's IGA | 2 | na | IGA, Flint, MI |
| Sefas Supermarkt | 1 | na | Central Grocery, Flint, MI |
| Tenuta's Supermarket | 1 | na | Spartan, Grand Rapids, MI |
| L&S Family Center | 1 | na | Spartan, Grand Rapids, MI |
| TOTAL | 49 | | |

## PORT HURON

| Market Area Covered:<br>St. Clair County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 53.6% | |
| Kroger | 3 | 20.7 | (Own) Livonia, MI |
| A&P | 3 | 11.6 | (Own) Detorit, MI |
| Farmer Jack | 1 | 9.6 | Borman's Inc., Detroit, MI |
| Great Scott | 1 | 6.1 | Abner A. Wolf, Detroit, MI |
| Spartan | 4 | 5.6 | (Own) Grand Rapids, MI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 16.4% | |
| IGA | 8 | 15.8 | Super Food Service, Vassar, MI |
| Associated Grocers | 3 | 0.6 | (Own) |
| OTHER GROCERY STORES | na | 30.0% | |
| TOTAL | 23+ | 100.0% | |

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na - not available

### SAGINAW

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 61.0% | |
| Ray's Food Fair | 8 | 22.0 | Bay City Milling, Bay City, MI |
| Meijer | 2 | 14.0 | (Own) Detroit, MI |
| Kessels | 2 | 10.0 | (Own) Saginaw, MI |
| Vescio's | 6 | 9.0 | Super Foods, Saginaw, MI |
| A&P | 2 | 6.0 | (Own) Detroit, MI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 13.0% | |
| IGA | 4 | 7.0 | Super Food Service, Vassar, MI |
| Spartan | 3 | 6.0 | (Own) Grand Rapids, MI |
| OTHER GROCERY STORES | 86 | 26.0% | |
| TOTAL | 113 | 100.0% | |

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## MINNESOTA

### DULUTH

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 84.0% | |
| Super Valu | 8 | 28.0 | (Own) Hopkins, MN |
| Twin Ports Grocery | | | |
| Coop | 9 | 42.0 | (Own) Superior, WI |
| Big Dollar | 9 | | Superior, WI |
| Super One | 3 | | Superior, WI |
| Piggly Wiggly | 1 | | Superior, WI |
| Other | 3 | | Superior, WI |
| Red Owl | 5 | 5.0 | Red Owl, Hopkins, MN |
| Other | 6 | 9.0 | Gateway, Minneapolis, MN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 16.0% | |
| IGA | 18 | 12.0 | Gateway Foods, Duluth, MN |
| Other | na | 4.0 | |
| TOTAL | 62+ | 100.0% | |

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na - not available

# MISSISSIPPI

## JACKSON

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 83.0% | |
| Kroger | 5 | 19.7 | (Own) Memphis, TN |
| Sunflower | 10 | 18.7 | (Own) Lewis Grocer, Indainola, MS |
| Jitney Jungle | 16 | 16.8 | (Own) McCarty-Holman, Jackson, MS |
| Sack N'Save Discount | 1 | 15.7 | McCarty-Holman, Jackson, MS |
| A&P | 4 | 6.7 | (Own) New Orleans, LA |
| Winn-Dixie | 4 | 5.4 | (Own) New Orleans, LA |
| LEADING INDEPENDENTS: | | 6.4% | |
| Big Star | 3 | 2.3 | Lewis Groc., Indianola, MS |
| Star | 3 | 2.2 | Malone & Hyde, Memphis, TN |
| New Deal | 2 | 1.9 | na |
| OTHER GROCERY STORES | 195 | 10.6% | |
| TOTAL | 243 | 100.0% | |

# MISSOURI

## COLUMBIA

| Market Area Covered: ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 37.0% | |
| Gerbes Market | 2 | 12.0 | Assoc. Grocers, Kansas City, MO |
| Safeway | 2 | 10.0 | Assoc. Grocers, Kansas City, MO |
| Schnucks | 1 | 9.0 | (Own) Bridgeton, MO |
| Kroger | 1 | 6.0 | St. Louis, MO |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 19.0% | |
| IGA | 2 | 9.0 | Wetterau Foods, Mexico, MO |
| Capital Foods (IGA) | 2 | 5.0 | Wetterau Foods, Mexico, MO |
| Affiliated Foods | 2 | 5.0 | Elwood, KS |
| LEADING INDEPENDENTS: | | 44.0% | |
| Baumgartner's Markets | 1 | 20.0 | na |
| Cronan's Market | 1 | | IGA, Mexico, MO |
| Da-Nite Grocery | 1 | | na |
| Greg's Market | 1 | | Skyrack Hirst, Jefferson City, MO |
| Showcase Mart | 1 | 24.0 | General Grocers, Washington, MO |
| Nowells United Super | 2 | | Fleming Co., No. Kansas City, MO |
| Wyatts U.S. Mart | 1 | | Fleming Co., No. Kansas City, MO |
| TOTAL | 20 | 100.0% | |

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na - not available

## ST. JOSEPH

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 59.0% | |
| Food For Less | 1 | 23.0 | Kansas City, MO |
| Green Hills | 5 | 18.0 | The Fleming Co., St. Joseph & Kansas City, MO |
| Food Barn | 1 | 8.0 | (Own) Kansas City, MO |
| Save-Mart | 1 | 5.0 | (Own) Kansas City, MO |
| Misc. Convenience Stores* | 10 | 5.0 | Kansas City, MO |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 41.0% | |
| Affiliated Foods<br>Drive In Stores, AF Supers, Thomas Markets, Thrift-Tee Markets | 34 | 40.0 | (Own) St. Joseph, MO |
| Aldi, Inc. | 1 | 1.0 | Burlington, IA |
| TOTAL | 53 | 100.0% | |

## SPRINGFIELD

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 63.1% | |
| Consumer's Markets | 11 | 28.2 | Direct & Consumer Warehouse, Springfield, MO |
| Ramey Supermarkets | 8 | 13.3 | Associated Wholesale Grocers, Springfield, MO |
| Dillons | 3 | 12.6 | (Own) Hutchinson, KS |
| Smitty's | 2 | 9.0 | Associated Wholesale Grocers, Springfield, MO |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 22.5% | |
| AG | 3 | 18.0 | Associated Wholesale Grocers, Springfield, MO |
| So-Lo | 6 | 4.5 | Associated Wholesale Grocers, Springfield, MO |
| LEADING INDEPENDENTS: | | 6.8% | |
| Git-N-Go Markets | 19 | 3.0 | Hale Halesell, Tulsa, OK |
| Quick Shop Markets | 9 | 1.5 | Ozark Grocers, Springfield, MO |
| Jiffy Markets & 7-Eleven | 9 | 1.3 | Ozark Grocers, Springfield, MO |
| Pic-N-Pay | 4 | 1.0 | Ozark Grocers, Springfield, MO |
| OTHER GROCERY STORES | 25 | 7.6% | |
| TOTAL | 99 | 100.0% | |

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* Convenience Stores include-7 Eleven & Convenience Food Mart

# MONTANA

## BILLINGS

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 56.0% | |
| Buttrey's | 5 | 31.0 | (Own) Great Falls, MT |
| Albertson's | 2 | 15.0 | West Coast Grocery, Spokane, WA |
| Safeway | 3 | 10.0 | Ryan's Inc., Billings, MT |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 32.0% | |
| IGA | 8 | 32.0 | Ryan's Inc., Billings, MT |
| LEADING INDEPENDENTS: | | 9.0% | |
| Kon's Sooper | 4 | 9.0 | Associated Food, Billings, MT |
| OTHER GROCERY STORES | 29 | 3.0% | |
| TOTAL | 51 | 100.0% | |

## GREAT FALLS

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 44.0% | |
| Buttrey Foods (Div. of Jewel) | 4 | 34.0 | Buttrey Warehouse, Gt. Falls, MT |
| Albertson's | 1 | 10.0 | (Own) Boise, ID |
| LEADING CONVENIENCE STORE CHAINS: | | 7.0% | |
| Circle K Stores | 5 | 3.0 | McClain Western, Tacoma, WA |
| Kwick Pik | 1 | 2.0 | Ryan Super Value, Gt. Falls, MT |
| 7-Eleven | 5 | 2.0 | McClain Western, Tacoma, WA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 35.0% | |
| IGA Stores | 3 | 21.0 | Ryan Super Valu, Gt. Falls, MT |
| County Market | 1 | 14.0 | Ryan Super Valu, Gt. Falls, MT |
| LEADING INDEPENDENTS: | | 10.0% | |
| Commissary | 1 | 8.0 | Ryan Super Value, Gt. Falls, MT |
| PX | 1 | 2.0 | Ryan Super Value, Gt. Falls, MT |
| OTHER GROCERY STORES | na | 4.0% | |
| TOTAL | 22+ | 100.0% | |

## HELENA

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 84.0% | |
| Buttreys | 1 | 35.4 | (Own) Great Falls, MT |
| Super Save Market | 2 | 22.2 | Associated Foods, Helena, MT |
| Safeway | 1 | 14.5 | (Own) Butte, MT |
| Albertson's | 1 | 12.6 | Roundup, Spokane, WA |
| LEADING INDEPENDENTS: | | 4.4% | |
| IGA Stores | 1 | 4.4 | Ryan's, Billings, MT |
| County Market | 1 | * | Ryan's, Billings, MT |
| OTHER GROCERY STORES | 26 | 10.9% | |
| TOTAL | 33 | 100.0% | |

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na - not available
* Included in "Other Grocery Stores"

# NEBRASKA

## HASTINGS

| Market Area Covered:<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 72.0% | |
| Jack & Jill | 3 | 30.0 | Nash Finch Co., Grand Island, NE |
| Country Fare IGA | 1 | 20.0 | Fleming Co., Lincoln, NE |
| Econo Foods | 1 | 20.0 | Nash Finch Co., Grand Island, NE |
| Gibson's | 1 | 2.0 | na |
| LEADING INDEPENDENTS: | | 28.0% | |
| Allen's | 1 | 28.0 | na |
| TOTAL | 7 | 100.0% | |

## LINCOLN

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Hinky Dinky Stores | 3 | na | (Own) Omaha, NE |
| HyVee Stores | 4 | na | (Own) Chariton, IA |
| Food 4 Less | 3 | na | (Own) Omaha, NE |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| IGA (Fleming Co.) | 8 | na | (Own) Lincoln, NE |
| Jack & Jill (Nash Finch) | 3 | na | (Own) Lincoln, NE |
| United A-G Stores (Assoc. Independent) | 4 | na | (Own) Omaha, NE |
| OTHER GROCERY STORES | 15 | | |
| TOTAL | 40 | | |

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na - not available

## NORFOLK

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Hy-Vee | 2 | na | (Own) Chariton, IA |
| Warehouse Market | 1 | na | Nash Finch, Minneapolis, MN |
| County Market | 1 | na | Super Valu, Des Moines, IA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Lynn & Al's GW Foods | 1 | na | Affiliated Foods Co-operative Inc., Norfolk, NE |
| Lou's Thrifty Way | 1 | na | Affiliated Foods Co-operative Inc., Norfolk, NE |
| Lynn & Al's Downtown GW Foods | 1 | na | Affiliated Foods Co-operative Inc., Norfolk, NE |
| Pic 'n Save | 1 | na | Affiliated Foods Co-operative Inc., Norfolk, NE |
| LEADING INDEPENDENTS: | | | |
| Jack's Market | 1 | na | Affiliated Foods Co-operative Inc., Norfolk, NE |
| TOTAL | 9 | | |

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na - not available

## OMAHA, NEB.-IOWA

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 71.5% | |
| Baker's | 10 | 29.3 | United AG Stores, Omaha, NE |
| Hy-Vee | 9 | 20.0 | (Own) Chariton, IA |
| Hinky Dinky** | 13 | 12.7 | Super Valu, Omaha, NE |
| Albertson's | 5 | 6.4 | (Own) Denver, CO |
| Food City | 2 | 3.1 | United AG Stores, Omaha, NE |
| Kwik Shops (C) | 29 | na | Gorden Foods, Des Moines, IA |
| Convenient Food Marts (C) | 14 | na | United AG Stores, Omaha, NE |
| 7-Eleven (C) | 21 | na | McLane Western, Denver, CO |
| Town & Country Markets (C) | 6 | na | McLane Western, Denver, CO |
| Casey's General Store (C) | 4 | na | (Own) Des Moines, IA |
| Eight-Eleven (C) | 3 | na | United AG Stores, Omaha, NE |
| Taylor's Quik-Pic (C) | 5 | na | United AG Stores, Omaha, NE |
| VOLUNTARY &/OR COOPERATIVE GROUIPS: | | 3.4% | |
| Super Valu | 2 | 1.7 | (Own) Des Moines, IA |
| Spartan Stores | 8 | 1.1 | United AG Stores, Omaha, NE |
| IGA Foodliners | 2 | 0.1 | Fleming Foods, Lincoln, NE |
| Jack & Jill** | 2 | 0.5 | Nash Finch, Grand Island, NE |
| LEADING INDEPENDENTS: | | 8.4% | |
| A.F. Base Commissary | 1 | 6.4 | |
| Louis Market | 1 | 0.7 | United AG Stores, Omaha, NE |
| Shaver's | 1 | 0.4 | |
| Philips Store | 1 | 0.5 | |
| Dick's Hillrise Market | 1 | 0.4 | |
| Frederick Bros. | 1 | 0.4 | |
| WAREHOUSE/BOX STORES: | | 12.4% | |
| No Frills Market ** | 4 | 4.7 | United AG Stores, Omaha, NE |
| World of Food | 1 | 3.6 | United AG Stores, Omaha, NE |
| Bag 'N Save | 2 | 3.3 | United AG Stores, Omaha, NE |
| Warehouse Market | 1 | 0.6 | Nash Finch, Minneapolis, MN |
| Price Buster ** | 1 | 0.2 | United AG Stores, Omaha, NE |
| OTHER GROCERY STORES | 104 | 4.3% | |
| TOTAL | 254 | 100.0% | |

Source: Consumer Preference Study, © 1985 by the Omaha World-Herald.

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(C) Convenience Store
na - not available

** Baker's closed 1 store. Hinky Dinky closed operations in Omaha February 1985. Of their 13 metro area stores, 5 became Food-4-Less, 1 became Jack & Jill, 1 became No Frills, 1 closed, 3 became independents. Price Buster closed February 1985. Nash Finch is the current supplier of the remaining 2 Hinky Dinky stores.

## SCOTTSBLUFF

| Market Area Covered:<br>Corporate City Limits | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 38.0% | |
| Safeway | 1 | 20.0 | (Own) Denver CO |
| Jack & Jill | 2 | 18.0 | Nash Finch, Rapid City, SD |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 34.0% | |
| Panhandle Coop | 1 | 34.0 | A.G., Colorado |
| LEADING INDEPENDENTS: | | 28.0% | |
| Alexander's Market | 1 | 11.0 | Nash Finch, Rapid City, SD |
| Town & Country Market | 1 | 10.0 | Affiliated, Norfolk, NE |
| Henry's Market | 1 | 7.0 | Affiliated, Norfolk, NE |
| TOTAL | 7 | 100.0% | |

# NEVADA

## RENO

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 90.0% | |
| Warehouse Markets | 10 | 30.0 | Bavarian Wholesale Groc., Co., Sparks, NV |
| Raley's | 6 | 21.0 | United Grocers, Sacramento, CA |
| Albertson's | 4 | 12.0 | (Own) Salt Lake City, UT |
| Safeway | 3 | 10.0 | (Own) Sacramento, CA |
| Gemco/Lucky | 2 | 9.0 | (Own) Lucky Stores Inc., San Leandro, CA |
| Mayfair | 2 | 6.0 | Certified Grocers of Cal., L.A. CA |
| 7-Eleven (C) | 19 | 2.0 | A.M. Lewis, Las Vegas, NV |
| OTHER GROCERY STORES | na | 10.0% | |
| TOTAL | 46+ | 100.0% | |

# NEW HAMPSHIRE

## NASHUA-MANCHESTER

| Market Area Covered:<br>Hillsborough County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 76.9% | |
| Alexander's Markets | 6 | 35.5 | (Own) Dracut, MA |
| DeMoulas Markets | 3 | 14.5 | (Own) Tewksbury, MA |
| Purity/Heartland | 2 | 10.9 | (Own) N. Billerica, MA |
| Allegro's Star Agency | 4 | 9.2 | (Own) Cambridge, MA |
| Shaw's Supermarkets | 1 | 3.8 | (Own) Portland, ME |
| A&P | 2 | 3.0 | (Own) Boston, MA |
| OTHER GROCERY STORES: | | 10.5% | |
| Koaly Farms | 1 | 5.9 | na |
| P & C | 1 | 1.3 | na |
| Hi Go Markets | 2 | 0.8 | Associated Grocers, Manchester, NH |
| Bunny's/Crossroads | 1 | 0.8 | Associated Grocers, Manchester, NH |
| Cricenti's | 1 | 0.8 | Associated Grocers, Manchester, NH |
| Hillsboro Farm Markets | 2 | 0.5 | na |
| BiWise Markets | 1 | 0.4 | Associated Grocers, Manchester, NH |
| Others | na | 12.6% | |
| TOTAL | 25+ | 100.0% | |

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(C) Convenience Stores
na - not available

## PORTSMOUTH

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Shaws | 2 | na | (Own) E. Bridgewater, MA |
| North Country Star | 1 | na | (Own) Kittery, ME |
| A&P | 1 | na | na |
| DeMoulas | 2 | na | (Own) Tewksbury, MA |
| IGA | 1 | na | York Village, ME |
| Mr. Grocer | 1 | na | York, ME |
| Shop and Save/Pic 'N Pay | 1 | na | Portsmouth, NH |
| OTHER GROCERY STORES: | | | |
| Richardson's Market | 1 | na | Portsmouth, NM |
| TOTAL | 10 | | |

# NEW JERSEY

## ATLANTIC CITY

| Market Area Covered:<br>Atlantic & Cape May Counties<br>(Atlantic City MSA) | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 77.9% | |
| Acme | 10 | 34.3 | (Own) Philadelphia, PA |
| Superfresh | 5 | 27.2 | (Own) Philadelphia, PA |
| Thriftway | 6 | 10.1 | (Own) King of Prussia, PA |
| Pathmark | 1 | 6.3 | (Own) Philadelphia, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 38.0% | |
| Shop Rite | 4 | 30.2 | Wafefern Food, Elizabeth, NJ |
| Foodtown | 1 | 2.9 | Twin County Grocers, Phila., PA |
| Shop N'Bag | 1 | 2.5 | Frankford-Quaker, Phila., PA |
| IGA | 4 | 2.4 | na |
| LEADING INDEPENDENTS: | | | |
| Casel's | 1 | na | Margate, NJ |
| Clover Meats | 2 | na | Northfield, NJ |
| OTHER GROCERY STORES | 64 | na | |
| TOTAL | 99 | * | |

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na - not available

* Percents add to more than 100.0% because of multiple answers in a shoppers survey.

## BRIDGEWATER

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| A&P | 13 | na | (Own) Edison, NJ |
| Shop-Rite | 9 | na | Wakefern Corp., Elizabeth, NJ |
| Foodtown | 8 | na | Twin County, Edison, NJ |
| Acme | 6 | na | (Own) Philadelphia, PA |
| Grand Union | 4 | na | (Own) Garfield, NJ |
| Pathmark | 4 | na | (Own) Woodbridge, NJ |
| LEADING INDEPENDENTS: | | | |
| Lane Co. | 2 | na | Easton, PA |
| TOTAL | 46 | na | |

## CAMDEN

| Market Area Covered:<br>Burlington, Camden & Gloucester Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Acme-Super Saver | 29 | na | (Own) Philadelphia, PA |
| Super-Fresh* | 5 | na | (Own) Florence, NJ |
| Pathmark | 7 | na | (Own) Woodbridge, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Shop N' Bag | 16 | na | (Own) Woodbridge, NJ |
| Shop-Rite | 7 | na | Wakefern Foods, Elizabeth, NJ |
| Thriftway | 10 | na | King of Prussia, PA |
| TOTAL | 74 | | |

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na - not available

* Super Fresh is owned and operated by A&P

## JERSEY CITY

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 42.5% | |
| Pathmark | 4 | 18.0 | (Own) Woodbridge, NJ |
| A&P | 9 | 17.5 | (Own) Paterson, NJ |
| Acme | 3 | 7.0 | Whippany, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 55.5% | |
| Shop Rite | 14 | 36.0 | Wakefern Food Corp., Elizabeth, NJ |
| Foodtown | 6 | 10.5 | Twin County Groc., Edison, NJ |
| Met Foods | 5 | 3.5 | White Rose Food Corp., Farmingdale, NY |
| Pagano's IGA | 2 | 3.0 | na |
| Fine Fare | 4 | 1.5 | na |
| C-Town | 2 | 1.0 | na |
| LEADING INDEPENDENTS: | | | |
| Shelly's | 1 | * | Twin County Groc., Edison, NJ |
| Universal | 2 | | na |
| Moloney's | 1 | | na |
| OTHER GROCERY STORES | 500 | 2.0% | |
| TOTAL | 553 | 100.0% | |

## LONG BRANCH-ASBURY PARK

| Market Area Covered: Monmouth and Ocean Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| A&P | 15 | na | (Own) Edison, NJ |
| Acme | 9 | na | (Own) Newark, NJ |
| Grand Union | 5 | na | (Own) Elmwood Park, NJ |
| Pathmark | 5 | na | (Own) Edison, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Shop-Rite | 15 | na | Wakefern Food Corp., Elizabeth, NJ |
| Foodtown | 24 | na | Twin City Grocers, Edison, NJ |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Cumberland Farms | 49 | na | na |
| Krauzer's | 34 | na | (Own) Edison, NJ |
| 7-Eleven | 37 | na | na |
| Wawa | 9 | na | na |
| Quick Chek | 12 | na | na |
| Fresh Farms | 1 | na | na |
| TOTAL | 215 | | |

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na - not available

* Included in "Other Grocery Stores"

## NEW BRUNSWICK

| Market Area Covered: ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 28.0% | |
| Pathmark | 6 | 13.0 | (Own) Woodbridge, NJ |
| A&P | 8 | 7.0 | (Own) Newark, NJ |
| Acme | 5 | 6.0 | (Own) Newark, NJ |
| Grand Union | 1 | 2.0 | (Own) Carlstadt, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 43.0% | |
| Shop-Rite | 13 | 24.0 | Wakefern Food Corp., Elizabeth, NJ |
| Mayfair | 12 | 19.0 | Twin County Grocers, Edison, NJ |
| OTHER GROCERY STORES | na | 29.0% | |
| TOTAL | 45+ | 100.0% | |

## PASSAIC

| Market Area Covered: Passaic, Bergen, Morris & Essex Counties, N.J. Trading Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 48.0% | |
| Pathmark | 20 | 25.0 | (Own) Woodbridge, NJ |
| A&P | 52 | 10.0 | (Own) Paterson & Edison, NJ |
| Grand Union | 34 | 8.0 | (Own) Elmwood Park, NJ |
| Acme Supermarkets, Inc. | 13 | 5.0 | (Own) Whippany, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 45.0% | |
| Shoprite | 44 | 30.0 | (Own) Wakefern Food Corp., Elizabeth, NJ |
| Foodtown | 47 | 15.0 | Twin County Grocers, Edison, NJ |
| LEADING INDEPENDENTS: | | 2.0% | |
| Kings | 13 | 1.0 | Perloff Bros., Philadelphia, PA |
| Met Supermarkets | 3 | 1.0 | White Rose Food Corp., Farmingdale, NY |
| OTHER GROCERY STORES | na | 5.0% | |
| TOTAL | 226+ | 100.0% | |

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na - not available

## SOMERVILLE-PLAINFIELD

| Market Area Covered: ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Acme | 11 | na | (Own) Kearny, NJ |
| Grand Union | 6 | na | (Own) Carlstadt, NJ |
| Pathmark | 5 | na | (Own) Woodbridge, NJ |
| A&P | 15 | na | (Own) Edison, NJ |
| Big-Buy Finast | 3 | na | Finast, Kearny, NH |
| Stop & Shop | 2 | na | (Own) North Haven, CT |
| Valley Fair | 1 | na | (Own) Linden, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Shop Rite | 12 | na | Wakefern Food Corp., Elizabeth, NJ |
| Foodtown | 6 | na | Twin County Grocers, Edison, NJ |
| Laneco | 2 | na | na |
| TOTAL | 63 | | |

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## TRENTON

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 28.0% | |
| Acme | 7 | 15.0 | (Own) Philadelphia, PA |
| Super Fresh | 3 | 7.0 | (Own) Florence, NJ |
| Pathmark | 1 | 6.0 | (Own) Woodbridge, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 46.0% | |
| ShopRite | 8 | 30.0 | (Own) Wakefern Food Corp., Elizabeth, NJ |
| Thriftway/Pennington | 6 | 10.0 | (Own) Thriftway, King of Prussia, PA |
| Shop 'N Bag | 4 | 6.0 | (Own) Frankford-Quaker Groc., Philadelphia, PA |
| OTHER GROCERY STORES | 36 | 26.0% | |
| TOTAL | 65 | 100.0% | |

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na - not available

# NEW MEXICO

## ALBUQUERQUE

| Market Area Covered: Bernallilo County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 81.9% | |
| Safeway | 11 | 24.0 | (Own) El Paso, TX |
| Alpha Beta | 3 | 13.4 | na |
| Smith's Food King | 11 | 11.7 | Western Grocers, Albuquerque |
| Save 'N Gain | 4 | 10.1 | Furr, Lubbock, TX |
| Bag N' Save | 4 | 9.6 | Asso. Groc. of Colo., Albuquerque, NM |
| Albertson's | 3 | 7.2 | Western Grocers, Albuquerque, NM |
| Furr's Food Markets | 4 | 5.9 | (Own) Lubbock, TX |
| LEADING CONVENIENCE STORE CHAINS: | | 7.4% | |
| Circle K | 54 | 3.8 | na |
| Allsups | 24 | 2.4 | na |
| 7-11 | 22 | 1.2 | na |
| LEADING INDEPENDENTS: | na | 10.7% | |
| TOTAL | 140+ | 100.0% | |

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## GALLUP

| Market Area Covered:<br>N.M.: McKinley County<br>Ariz.: Apache County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 41.0% | |
| Smith's Foodway | 1 | 18.0 | na |
| Albertson's | 1 | 14.0 | na |
| Piggly Wiggly | 1 | 9.0 | na |
| Safeway | 1 | na | na |
| LEADING INDEPENDENTS: | | 53.0% | |
| California Markets | 2 | 26.0 | Assoc. Groc., NM |
| Shop 'N Save Warehouse Foods | 1 | 14.0 | Assoc. Groc., NM |
| Dandee's | 1 | 13.0 | Assoc. Groc., NM |
| OTHER GROCERY STORES (Tanner's, Navajo Shopping Center, Imperial, 7 to 11, Circle K) | na | 6.0% | |
| TOTAL | 8+ | 100.0% | |

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na - not available

## ROSWELL

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 82.0% | |
| Safeway | 3 | 40.0 | (Own) El Paso, TX |
| Furrs | 2 | 20.0 | (Own) Lubbock, TX |
| Albertson's | 1 | 15.0 | (Own) Denver, CO |
| Save & Gain | 1 | 7.0 | (Own) Lubbock, TX |
| OTHER GROCERY STORES | na | 18.0% | |
| TOTAL | 7+ | 100.0% | |

## SANTA FE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Safeway | 3 | 30.0 | (Own) El Paso, TX |
| Furrs | 1 | 22.0 | (Own) Lubbock, TX |
| Associated Groc. | 3 | 22.0 | Assoc. Groc. of Colorado, Albuquerque, NM |
| Albertson's | 2 | 13.0 | Waples-West, Lubbock, TX |
| Smith's Food King | 1 | 12.0 | Western Grocers, Albuquerque, NM |
| Bag 'N Save | 1 | na | na |
| Skaggs Alpha Beta | 1 | na | Salt Lake City, UT |
| OTHER GROCERY STORES | na | 9.0% | |
| TOTAL | 12+ | 100.0% | |

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na - not available

# NEW YORK

## BINGHAMTON

Market Area Covered:
N.Y.: Boome, Tioga Counties
Pa.: Susquehanna County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 95.1% | |
| Giant | 11 | 35.9 | Akel Warehouse, Johnson City, NY |
| Great American | 15 | 22.8 | (Own) Victory, Norwich, NY |
| Grand Union | 6 | 22.2 | (Own) Waterford, NY |
| Shusters | 6 | 5.1 | na |
| Shop-Rite | 1 | 4.0 | (Own) |
| Norman's | 2 | 3.5 | (Own) Binghamton, NY |
| P&C | 1 | 1.6 | (Own) Syracuse, NY |
| Day & Night Stores (C) | 5 | * | na |
| Reliable Markets | 1 | * | na |
| 7-Eleven Stores (C) | 3 | * | na |
| OTHER GROCERY STORES | na | 4.9% | |
| TOTAL | 51+ | 100.0% | |

## ELMIRA

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Super Creek Stores | 8 | na | na |
| Convenient Food Marts (C) | 5 | na | S.M. Flickinger, Elmira, NY |
| Great American | 2 | na | (Own) Norwich, NY |
| P&C | 2 | na | (Own) Syracuse, NY |
| Super Duper | 2 | na | S.M. Flickinger, Elmira Hgts., NY |
| Acme | 1 | na | (Own) Syracuse, NY |
| Tops | 2 | na | (Own) Buffalo, NY |
| Weis Markets | 1 | na | (Own) Sunbury, PA |
| TOTAL | 23 | | |

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na - not available
* Included in "Other Grocery Stores"
(C) Convenience Stores

## GLENS FALLS

| Market Area Covered: ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Grand Union | 6 | na | (Own) Waterford, NY |
| Price Chopper | 3 | na | (Own) Schenectady, NY |
| Shop Rite | 1 | na | (Own) Florida, NY |
| LEADING INDEPENDENTS: | | | |
| Barbers Market | 2 | na | Bi-Lo, Albany, NY |
| Lewis Super Market | 1 | na | P & C Cross, White River Junction, VT |
| Clay's Market | 1 | na | P & C Cross, White River Junction, VT |
| OTHER GROCERY STORES: | | | |
| Convenient Food Markets | 8 | na | (Own) Syracuse, NY |
| Cumberland Farms | 4 | na | (Own) Canton, MA |
| TOTAL | 26 | | |

## JAMESTOWN

| Market Area Covered: ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Quality Markets, Inc. | 12 | na | (Own) Jamestown, NY |
| Super Duper | 2 | na | S.M. Flickinger Co., Jamestown, NY |
| Bells | 3 | na | Peter J. Schmitt, Buffalo, NY |
| Tops Markets | 1 | na | (Own) Buffalo, NY |
| Wilson Farms | 2 | na | Tops Markets, Buffalo, NY |
| LEADING INDEPENDENTS: | | | |
| Lake County Dairy Stores | 6 | na | S.M. Flickinger Co., Jamestown, NY |
| TOTAL | 26 | | |

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na - not available

## NIAGARA FALLS

| Market Area Covered: ABC City Zone | No. of Stores | Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 60.0% | |
| Tops Markets | 5 | 60.0 | Niagara Frontier Services, Buffalo, NY |
| LEADING CONVENIENCE STORE CHAINS: | | 20.0% | |
| B-Kwik | 2 | 10.0 | Niagara Frontier Services, Buffalo, NY |
| Wilson Farms | 6 | 9.0 | Niagara Frontier Services, Buffalo, NY |
| 7-Eleven | 3 | 1.0 | Southland Distribution Services |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 19.0% | |
| Bells | 1 | na | Peter J. Schmitt, Buffalo, NY |
| Super Duper-Pine Plaza | 1 | 19.0 | Flickinger Corp., Buffalo, NY |
| Super Duper-City Market | 1 | na | Flickinger Corp., Buffalo, NY |
| LEADING INDEPENDENTS: | | 1.0% | |
| Slipko Bros. | 1 | 1.0 | Flickinger Corp., Buffalo, NY |
| OTHER GROCERY STORES | 14 | na | |
| TOTAL | 34 | 100.0% | |

## ROME

| Market Area Covered: ABC City Zone | No. of Stores | Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 59.0% | |
| Price Chopper | 1 | 15.0 | (Own) Schenectady, NY |
| Victory | 2 | 14.0 | (Own) Norwich, NY |
| Grand Way | 1 | 12.0 | Grand Union, Waterford, NY |
| Chicago | 2 | 11.0 | Netti Wholesale, Syracuse, NY |
| P&C | 1 | 7.0 | (Own) Syracuse, NY |
| VOLUNTARY &/OR COOPEATIVE GROUPS: | | 8.0% | |
| Scheidelman | 12 | 8.0 | (Own) Utica, NY |
| LEADING INDEPENDENTS: | | 8.0% | |
| Gillette's | 1 | 4.0 | na |
| Schaller's | 1 | 2.0 | na |
| Joe's Foodland | 1 | 2.0 | Scheidelman, Inc., Utica, NY |
| OTHER GROCERY STORES | 45 | 25.0% | |
| TOTAL | 67 | 100.0% | |

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na - not available

## SYRACUSE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 69.0% | |
| P&C Food Markets (Incl. Midstate & Big M Co-ops) | 41 | 28.0 | (Own) State Fair & Van Vleck, Svracuse, NY |
| Wegman's | 8 | 18.0 | (Own) Rochester, NY |
| Price Chopper | 8 | 12.0 | Golub Corp., Schenectady, NY |
| Tops Markets | 9 | 11.0 | Niagara Frontier Services, Buffalo, NY |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 12.0% | |
| Hometown Markets | 8 | 7.0 | P&C Foods, Syracuse, NY |
| IGA | 7 | 5.0 | S.M. Flickinger, Liverpool, NY |
| OTHER GROCERY STORES (Incl. Gren Hills and William Groceries) | na | 19.0% | |
| TOTAL | 81+ | 100.0% | |

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na - not available

## UTICA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 50.0% | |
| Chicago Markets | 8 | 25.0 | Victory Mkts., Norwich, NY |
| Price Chopper | 3 | 15.0 | Golub Corp., Schectady, NY |
| Grand Union | 2 | 5.0 | (Own) Syracuse, NY |
| P&C Markets | 1 | 2.0 | (Own) Syracuse, NY |
| Great American | 2 | 2.0 | (Own) Norwich, NY |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 20.0% | |
| Scheidelman | 13 | 20.0 | (Own) Utica, NY |
| LEADING INDEPENDENTS: | | 7.0% | |
| Chanatry | 2 | 3.0 | Scheidelman, Inc., Utica, NY |
| Aiello's Market | 1 | 2.0 | na |
| Herkimer Chief | 1 | 2.0 | na |
| OTHER GROCERY STORES | 197 | 23.0% | |
| TOTAL | 230 | 100.0% | |

## WATERTOWN

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 105.0% | |
| P&C | 3 | 65.0 | (Own) Syracuse, NY |
| Great American | 1 | 28.0 | (Own) Victory Mkts., Norwich, NY |
| A&P | 1 | 12.0 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 13.0% | |
| IGA | 1 | 13.0 | S.M. Flickinger, Buffalo, NY |
| OTHER GROCERY STORES: | | 1.0% | |
| Kwik Stop | 3 | 1.0 | na |
| TOTAL | 9 | * | |

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* Adds to more than 100.0% because of multiple answers in a shoppers survey.
na - not available

# NORTH CAROLINA

## ASHEVILLE

| Market Area Covered:<br>16 County Market | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 72.0% | |
| Ingles Markets | 16 | 45.0 | Asheville, NC |
| Winn-Dixie | 5 | 14.0 | (Own) Greenville, SC |
| Bi-Lo | 5 | 11.0 | Greenville, SC |
| Fast Fare (C) | 7 | 1.5 | na |
| 7-Eleven (C) | 2 | 0.5 | Atlanta, GA |
| Fine Fare Grocery Warehouse | 1 | * | Ingles Markets, Asheville, NC |
| Hop-In (C) | 6 | * | Save-A-Stop, Salem, VA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 7.0% | |
| Merchants Distributors | 25 | 3.5 | Hickory, NC |
| Thomas & Howard | 23 | 3.0 | Asheville, NC |
| Haywood Grocery Co. | 2 | 0.5 | Waynesville, NC |
| OTHER GROCERY STORES | 98 | 21.0% | |
| TOTAL | 190 | 100.0% | |

## CHARLOTTE

| Market Area Covered:<br>Mecklenberg County | No. of Stores | Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 88.7% | |
| Harris-Teeter | 20 | 22.2 | (Own) Charlotte, NC |
| Food Lion | 9 | 20.9 | (Own) Salisbury, NC |
| Winn-Dixie | 10 | 16.5 | (Own) Charlotte, NC |
| Kroger Sav-On | 8 | 12.3 | (Own) Charlotte, NC |
| A&P | 7 | 7.2 | (Own) Charlotte, NC |
| Bi-Lo | 5 | 6.5 | (Own) Greenville, SC |
| 3-Guys | 2 | 3.1 | (Own) Salisbury, NC |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 2.5% | |
| Park "N' Shop | 2 | 1.3 | Assoc. Groc. Mutual of Carolina, Charlotte, NC |
| Giant Genie | 2 | 1.2 | Assoc. Groc. Mutual of Carolina, Charlotte, NC |
| OTHER GROCERY STORES | na | 8.8% | |
| TOTAL | 65+ | 100.0% | |

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(C) Convenience Stores
na - not available
* Included in "Other Grocery Stores"

## DURHAM

| Market Area Covered:<br>Durham & Orange Counties | No. of Stores | Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 96.0% | |
| Food Lion | 8 | 25.0 | (Own) Salisbury, NC |
| Winn-Dixie | 8 | 23.0 | (Own) Raleigh, NC |
| Kroger | 5 | 20.0 | (Own) Salem, VA |
| Big Star | 4 | 11.0 | (Own) Raleigh, NC |
| A&P | 4 | 8.0 | (Own) Charlotte, NC |
| Harris-Teeter | 3 | 7.0 | (Own) Charlotte, NC |
| Byrd's Food Center | 3 | 1.0 | Burlington, NC |
| Piggly Wiggly | 2 | 1.0 | (Own) Kinston, NC |
| 7-Eleven (C) | 12 | na | Raleigh, NC |
| Fast Fare (C) | 8 | na | Henderson, NC |
| Ken's Quickie Mark (C) | 7 | na | Durham, NC |
| Li'l General (C) | 5 | na | na |
| Lit'l Rebel (C) | 3 | na | na |
| LEADING INDEPENDENTS: | | 1.5% | |
| King's Red & White | 1 | 0.5 | Thos. & Howard, Durham, NC |
| Fowler's of Durham | 1 | 0.5 | Durham, NC |
| Fowler's Food Store | 1 | 0.5 | Chapel Hill, NC |
| OTHER GROCERY STORES | na | 2.5% | |
| TOTAL | 75+ | 100.0% | |

## FAYETTEVILLE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 80.3% | |
| Winn-Dixie | 7 | 20.4 | (Own) Raleigh, NC |
| Food Lion | 7 | 18.1 | (Own) Salisbury, NC |
| Harris-Teeter/Food World | 2 | 11.7 | (Own) Charlotte, NC |
| Big Star | 3 | 10.8 | (Own) Raleigh, NC |
| Kroger Sav-On | 3 | 9.7 | (Own) Charlotte, NC |
| A&P | 2 | 7.1 | (Own) Charlotte, NC |
| 3 Guys | 2 | 2.5 | (Own) Salisbury, NC |
| OTHER GROCERY STORES: | | | |
| Including: | | | |
| Short Stop Stores | 11 | 19.7 | Various |
| Quick Stop Stores | 38 | | |
| V-Point Supermarket | 1 | | |
| Economy Food Center | 1 | | |
| Other | 126 | | |
| TOTAL | 203 | 100.0% | |

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(C) Convenience Stores
na - not available

## GREENSBORO

| Market Area Covered:<br>Guilford County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 76.0% | |
| Food Lion (Town) | 13 | 24.0 | Save-Rite, Inc., Salisbury, NC |
| Winn-Dixie | 9 | 18.0 | (Own) Raleigh, NC |
| Food World | 10 | 16.0 | High Point, NC |
| Kroger | 3 | 15.0 | (Own) Salem, VA |
| Big Star | 6 | 3.0 | (Own) Raleigh, NC |
| Columbia Foods | 5 | * | Central Carolina Grocers, High Point, N.C. |
| Family Mart | 1 | * | na |
| LEADING INDEPENDENTS: | | 11.0% | |
| Bestway | 6 | 9.0 | Central Carolina Grocers, High Point, NC |
| Bi-Rite | 3 | 2.0 | Central Carolina Grocers, High Point, NC |
| Food Rite | 9 | * | na |
| OTHER GROCERY STORES | 136 | 13.0% | |
| TOTAL | 201 | 100.0% | |

## RALEIGH

| Market Area Covered:<br>Wade County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Big Star | 9 | 28.0 | (Own) Elmwood Park, NJ |
| Food Lion | 10 | 22.0 | (Own) Salisbury, NC |
| Winn-Dixie | 15 | 21.0 | (Own) Raleigh, NC |
| A&P | 8 | 10.0 | (Own) Charlotte, NC |
| Harris-Teeter | 2 | 5.0 | (Own) Charlotte, NC |
| Food World | 3 | 4.0 | (Own) Charlotte, NC |
| Kroger | 1 | 1.0 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 6.0% | |
| Piggly Wiggly | 3 | 4.0 | (Own) Kinston, N.C. |
| IGA | 1 | 1.0 | Quinn Wholesale, Warsaw, NC |
| Red & White | 2 | 1.0 | (Own) Rocky Mount, NC |
| OTHER GROCERY STORES | na | 3.0% | |
| TOTAL | 54+ | 100.0% | |

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na - not available

* Included in "Other Grocery Stores"

### WINSTON-SALEM

| Market Area Covered: Forsyth County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 87.2% | |
| Food Fair | 12 | 24.4 | (Own) Winston-Salem, NC |
| Food Lion | 10 | 15.7 | Save Rite, Inc., Salisbury, NC |
| Kroger | 3 | 11.3 | (Own) Salem, VA |
| Winn-Dixie | 5 | 9.6 | (Own) Raleigh, NC |
| Mt. Tabor | 3 | 9.6 | Central Carolina, Kernersville, NC |
| Food World | 6 | 6.1 | (Own) High Point, NC |
| Others* | 7 | 4.4 | Various |
| Lowe's Foods (Thrifti-Mart) | 5 | 3.5 | (Own) Wilkesboro, NC |
| 3 Guys | 1 | 2.6 | na |
| CONVENIENCE STORES | na | 5.7% | |
| LEADING INDEPENDENTS | na | 7.1% | |
| TOTAL | 52+ | 100.0% | |

## NORTH DAKOTA

### FARGO-MOORHEAD

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 57.0% | |
| Piggly Wiggly/Jack & Jill | 7 | 20.0 | Nash Finch Co., Fargo, ND |
| Buttrey Foods | 2 | 17.0 | Fairway Foods, Fargo, ND |
| Country Stores | 2 | 15.0 | Red Owl Stores, Fargo, ND |
| Warehouse | 1 | 5.0 | Red Owl Stores, Fargo, ND |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.0% | |
| Super Valu/U Save | 2 | 5.0 | Super Valu, Fargo, ND |
| LEADING CONVENIENCE STORE CHAINS: | | 3.0% | |
| Stop-N-Go | 13 | 3.0 | L.B. Hartz Co., Thief R. Falls, MN |
| LEADING INDEPENDENTS: | | 35.0% | |
| Hornbachers | 3 | 35.0 | Super Valu, Fargo, ND |
| TOTAL | 30 | 100.0% | |

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na - not available

* Includes Shoprite, Foodland, Bestway.

## MINOT

Market Area Covered:
Corporate City Limits

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 67.0% | |
| Piggly Wiggly | 3 | 53.0 | Nash Finch, Minot, ND |
| Albertson's | 1 | 8.0 | Super Valu, Fargo, ND |
| LEADING INDEPENDENTS: | | 27.0% | |
| Miracle Mart | 1 | 27.0 | Super Valu, Bismarck, ND |
| Red Owl | 1 | 6.0 | (Own) Fargo, ND |
| OTHER GROCERY STORES | na | 6.0% | |
| TOTAL | 6+ | 100.0% | |

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na - not available

# OHIO

## AKRON

Market Area Covered:
Summit, Portage & Medina Counties

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 53.0% | |
| Acme/Click | 23 | 36.0 | Fred W. Albrecht Co., Akron, OH |
| Fazio's | 7 | 13.0 | Heritage Wholesalers, Bedford Heights, OH |
| Pick-N-Pay | 2 | 3.0 | (Own) Cleveland, OH |
| Heinen's | 1 | 1.0 | (Own) Bedford Heights, OH |
| LEADING CONVENIENCE STORE CHAINS: | | 3.0% | |
| Open Pantry | 13 | 1.0 | American Seaway Foods, Inc., Bedford Heights, OH |
| Convenient Food Mart | 7 | 1.0 | Frank Fortune Grocery, Ashtabula, OH |
| Quick Shop | 4 | 0.5 | American Seaway Foods, Inc., Bedford Heights, OH |
| Lawson's | 600 | 0.5 | Consolidated Foods |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 36.0% | |
| Sparkle | 29 | 15.0 | Betsy Ross Foods, Mogadore, OH |
| Giant Eagle | 7 | 7.0 | (Own) Pittsburgh, PA |
| IGA | 10 | 4.0 | McLain Grocery, Massillon, OH |
| Food Basket | 2 | 4.0 | Heritage Wholesalers, Bedford Heights, OH |
| Betsy Ross | 12 | 4.0 | Betsy Ross Foods, Mogadore, OH |
| Stop-N-Shop | 4 | 2.0 | American Seaway Foods, Inc., Bedford Heights, OH |
| LEADING INDEPENDENTS: | | 8.0% | |
| Bisson's | 3 | 8.0 | Betsy Ross Foods, Mogadore, OH & American Seaway Foods, Inc., Bedford Heights, OH |
| West Point Market | 1 | | Besty Ross Foods, Mogadore, OH |
| May Bros. | 2 | | Betsy Ross Foods, Mogadore, OH |
| Hawkins Markets | 1 | | Associated Grocers, Dennison, OH |
| Buehler's Food Market | 2 | | Scot Lad Foods, Lima, OH |
| Darrow's Family Food | 2 | | American Seaway Foods, Inc., Bedford Heights, OH |
| TOTAL | 732 | 100.0% | |

## CANTON

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 47.0% | |
| Fisher Goods of Canton | 5 | 20.0 | (Own) Canton, OH |
| A&D | 4 | 10.0 | McLain Grocery, Massillon, OH |
| Edward's Warehouse | 1 | 5.0 | Pick 'N Pay, Maple Hgts., OH |
| Fisher/Fazio | 1 | 5.0 | Betsy Ross Foods, Mogadore, OH |
| Sparkle | 2 | 4.0 | Betsy Ross Roods, Mogadore, OH |
| Lawson's | 31 | na | (Own) Akron, OH |
| Spee Dee Foods/Minit Mart | 17 | na | (Own) Akron, OH |
| Acme/Click | 2 | na | Akron, OH |
| Valu King | 2 | 1.0 | Tamarkin Co., Youngstown, OH |
| Stop-N-Go | 11 | 1.0 | American Seaway Foods, Bedford Hgts., OH |
| 7-Eleven | 2 | na | na |
| CFM | 1 | 0.5 | Scot Lad Foods, Lima, OH |
| Open Pantry | 2 | 0.5 | American Seaway Foods, Bedford Hgts., OH |
| Carm's Foods | 2 | na | na |
| King Kwik | 2 | na | Scot Lad Foods, Lima, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 47.0% | |
| IGA | 28 | 40.0 | McLain Grocery, Massillon, OH |
| A/G | 17 | 7.0 | Dennison, OH |
| LEADING INDEPENDENTS: | | 6.0% | |
| Bordner's | 2 | 4.0 | na |
| Stoll's | 1 | 2.0 | McLain Grocery, Massillon, OH |
| TOTAL | 132 | 100.0% | |

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na - not available

# DAYTON

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 59.0% | |
| Kroger | 25 | 37.0 | (Own) Cincinnati, OH |
| White Villa (C) | 100 | 11.0 | Super Valu, Xenia, OH |
| Stump's and Stump's U-Save | 7 | 6.0 | Super Valu, Xenia, OH |
| Lawson's (C) | 26 | na | Consolidated Foods, Cuyahoga, OH |
| Stop & Go (C) | 22 | | (Own) Trotwood, OH |
| 7-Eleven (C) | 36 | | (Own) Rolling Meadows, IL |
| King Kwik (C) | 23 | | (Own) Cincinatti, OH |
| United Dairy (C) | 7 | | (Own) Cincinatti, OH |
| Fulmer's | 10 | 3.0 | Super Valu, Xenia, OH |
| Foodtown (Al & Joe's) | 3 | 1.0 | Seaway, Toledo, OH |
| Marsh | 3 | * | (Own) Yorktown, IN |
| Metro Market | 3 | 1.0 | Cardinal Foods, Columbus, OH |
| Pangles Thrifty Market | 1 | * | Scot Lad, Lima, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 13.0% | |
| IGA | 19 | 10.0 | Super Food Services, Dayton, OH |
| Super Valu | 11 | 3.0 | (Own) Xenia, OH |
| LEADING INDEPENDENTS: | | 21.0% | |
| Earey's | na | 5.0 | na |
| Kash 'N Karry | 3 | 3.0 | na |
| Lofino | 2 | 2.0 | Super Valu, Xenia, OH |
| Bob's Food Warehouse | 1 | 2.0 | na |
| Kantor's Supermarket | 1 | 2.0 | na |
| Freedom Foods | 4 | 1.0 | White Villa Grocery, Dayton, OH |
| Woody's | 1 | 1.0 | White Villa Grocery, Dayton, OH |
| Dillman Foods | 1 | 1.0 | Super Valu, Xenia, OH |
| Dorothy Lane Market | 1 | 1.0 | Super Valu, Xenia, OH |
| Phil & Jerry's | 1 | 1.0 | White Villa Grocery, Dayton, OH |
| County Market | 1 | 1.0 | Super Valu, Xenia, OH |
| Shiloh Market | 1 | 1.0 | Super Foods, Dayton, OH |
| Dots | na | * | na |
| OTHER GROCERY STORES | 264 | 7.0% | |
| TOTAL | 577+ | 100.0% | |

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na - not included
(C) Convenience Stores
* Included in "Other Grocery Stores"

## LIMA

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Ray's Supermarkets | 3 | na | Scot Lad, Lima, OH |
| Foodtown Kash 'n Karry | 1 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| IGA | 3 | na | Super Food Service, Dayton, OH |
| Pantry Pride | 2 | na | Super Food Service, Dayton, OH |
| LEADING INDEPENDENTS: | | | |
| Clyde Evans Markets | 6 | na | Food Marketing, Fort Wayne, IN |
| Clyde Evans County Markets | 1 | na | |
| OTHER GROCERY STORES | 19 | na | |
| TOTAL | 35 | | |

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## LORAIN-ELYRIA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 79.0% | |
| Fisher Foods | 8 | 27.0 | (Own) Bedford Hgts., OH |
| Bi-Lo (Kroger) | 5 | 18.0 | (Own) Maple Hgts., OH |
| Sparkle (C) | 7 | 10.0 | Betsy Ross Foods, Mogadore, OH |
| Pick-N-Pay (Edwards) | 2 | 10.0 | (Own) Maple Hgts., OH |
| CFM | 15 | 10.0 | Scot Lad Foods, Lima, OH |
| Eagle | 5 | 3.0 | (Own) Bedford Hgts., OH |
| Open Pantry (C) | 4 | 1.0 | American Seaway Food, Bedford Hgts., OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 11.5% | |
| IGA (McLain) | 6 | 9.0 | McLain Groc. Co., Massillon, OH |
| Super Valu | 1 | 1.5 | Super Valu, Xenia, OH |
| A/G | 1 | 0.5 | Dennison, OH |
| Betsy Ross | 2 | 0.5 | Betsy Ross, Mogadore, OH |
| OTHER GROCERY STORES | na | 9.5% | |
| TOTAL | 56+ | 100.0% | |

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(C) Convenience Stores
na - not available

# SANDUSKY

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 74.0% | |
| Pick 'N Pay | 3 | 32.0 | (Own) Maple Heights, OH |
| Kroger | 1 | 21.0 | (Own) Solon, OH |
| Foodtown | 2 | 18.0 | (Own) Maumee, OH |
| Lawson's (C) | 3 | 3.0 | (Own) Akron, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 7.0% | |
| Foodland | 1 | 7.0 | Defiance Grocery, Defiance, OH |
| LEADING INDEPENDENTS: | | | |
| Enderle's Cardinal | 1 | * | na |
| Sandusky Cardinal | 1 | * | na |
| Sandusky IGA | 1 | * | na |
| Consolo's IGA | 1 | * | na |
| Keeber Marine Grocery | 1 | * | na |
| Kuhn's Best Mart | 1 | * | na |
| Eastman's Best Mart | 1 | * | na |
| Miller Bros. Super Save Serve Grocery & Market | 1 | * | na |
| OTHER GROCERY STORES (Includes Grocery and Carry-Out) | 17 | 19.0% | |
| TOTAL | 35 | 100.0% | |

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(C) Convenience Stores
na - not available
* Included in "Other Grocery Stores"

## SPRINGFIELD

| Market Area Covered: ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 52.5% | |
| Kroger | 6 | 20.0 | (Own) Cincinnati, OH |
| Fulmers | 4 | 16.0 | Super Valu, Xenia, OH |
| Big Bear | 5 | 14.0 | (Own) Columbus, OH |
| Lawson Milk (C) | 10 | 2.0 | Cuyahoga Falls, OH |
| 7-Eleven (C) | 3 | 0.5 | White Villa, W. Carrollton, OH |
| LEADING INDEPENDENTS: | | 23.0% | |
| Northridge IGA | 1 | 11.0 | Super Foods, Bellefontaine, OH |
| Shoemakers | 2 | 10.0 | Super Valu, Xenia, OH |
| Howard | 2 | | Super Valu, Xenia, OH |
| Johnson Super Valu | 1 | | Super Valu, Xenia, OH |
| Mundys | 1 | 2.0 | White Villa, W. Carrollton, OH |
| Pik N Pak | 1 | na | Super Foods, Bellefontaine, OH |
| OTHER GROCERY STORES | na | 24.5% | |
| TOTAL | 36+ | 100.0% | |

## STEUBENVILLE

| Market Area Covered: ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Kroger | 2 | na | (Own) Columbus, OH |
| Big Bear | 1 | na | (Own) Columbus, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Foodland | 1 | na | na |
| IGA | 1 | na | McLain Grocers, Massilon, OH |
| Valu King | 1 | na | Tomarkin, Youngstown, OH |
| LEADING INDEPENDENTS: | | | |
| Convenience Mkts. | 2 | na | Associated Grocers, Dennison, OH |
| Co-op Food Mkts. | 1 | na | Wheeling Wholesale, Wheeling, WV |
| Big "D" Market | 1 | na | Wheeling Wholesale, Wheeling, WV & Associated Grocers, Uhrichsville, OH |
| TOTAL | 10 | | |

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(C) Convenience Stores
na - not available

# TOLEDO

| Market Area Covered:<br>Metropolitan Statistical Area<br>Fulton, Lucas & Wood Counties | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 73.0% | |
| Food Town (incl. Kash & Karry) Stores) | 35 | 32.0 | (Own) Toledo, OH |
| Kroger | 14 | 28.0 | (Own) Detroit, MI |
| Centre Markets | 6 | 6.0 | Scot Lad Foods, Lima, OH |
| Farmer Jack | 1 | 2.0 | Borman's, Detroit, MI |
| Pick-N-Pay (Edward's) | 1 | 2.0 | (Own) Cleveland, OH |
| Lawson's (C) | 18 | | Lawson Milk Co., Cuyahoga Hgts., OH |
| Franklin Ice Cream Stores (C) | 12 | 2.0 | Allied Foods, Detroit, MI |
| Open Pantry (C) | 12 | | United Grocery Co., Lansing, MI |
| Sterling Milk Stores (C) | 23 | 1.0 | Assoc. Grocers, Hold, MI |
| Convenient Food Stores (C) | 5 | * | Scot Lad Foods, Lima, OH |
| In and Out Stores (C) | 23 | * | J.M. Sealts Co., Lima, OH |
| 7-Eleven (C) | 24 | * | Southland Distrib. Co.,<br>Champaign, IL |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 2.0% | |
| AG & 5 Star Food Stores | 10 | 2.0 | (Own) Holt, MI |
| LEADING INDEPENDENTS: | | 16.0% | |
| Churchills | 5 | 12.0 | Food Marketing, Ft. Wayne, IN<br>Scot Lad Foods, Lima, OH |
| Kelly's IGA | 3 | 4.0 | IGA Whse., Bellefontaine, OH |
| Bischoff's | 1 | | Assoc. Grocers, Holt, MI |
| OTHER GROCERY STORES | 36 | 9.0% | |
| TOTAL | 230 | 100.0% | |

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(C) Convenience Stores

* Included in "Other Grocery Stores"

## YOUNGSTOWN-WARREN

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 82.1% | |
| Valu King | 57 | 38.9 | Tamarkin Co., Youngstown, OH |
| Sparkle Markets | 24 | 24.7 | Betsy Ross, Mogadore, OH |
| Lawson Milk Co. | 27 | 5.7 | Cardinal Foods, Columbus, OH |
| Carl's | 1 | 2.7 | Heritage Wholesaler's Bedford Hts., OH |
| Convenient Food Marts | 10 | 2.3 | (Own) Solon, OH |
| Super Duper | 5 | 1.9 | S.M. Flickinger, Buffalo, NY |
| Fast Check | 10 | 1.9 | (Own) Youngstown, OH |
| Lil Shopper | 12 | 1.7 | (Own) Sharon, PA |
| Fazio's | 1 | 0.9 | Heritage Wholesalers, Bedford Hgts., OH |
| Lo-Buy | 2 | 0.9 | (Own) Solon, OH |
| Quik Chek | 3 | 0.7 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 11.3% | |
| United Family Foods | 15 | 5.8 | Tamarkin Co., Youngstown, OH |
| Golden Dawn | 7 | 2.9 | Peter J. Schmitt, Sharon, PA |
| Mavars Markets | 4 | 1.0 | Tamarkin Co., Youngstown, OH |
| Isaly Dairy Stores | 9 | 1.0 | na |
| Queens Markets | 4 | 0.6 | Peter J. Schmitt, Sharon, PA |
| OTHER GROCERY STORES | 264 | 6.6% | |
| TOTAL | 455 | 100.0% | |

## ZANESVILLE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 60.0% | |
| Big Bear | 3 | 30.0 | (Own) Columbus, OH |
| Kroger | 3 | 30.0 | (Own) Columbus, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 35.0% | |
| IGA Foodliners | 6 | 20.0 | McLain Grocery, Massillon, OH |
| Foodtown | 5 | 15.0 | Creasey Co., Columbus, OH |
| OTHER GROCERY STORES | 34 | 5.0% | |
| TOTAL | 51 | 100.0% | |

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na - not available

# OKLAHOMA

## ENID

Market Area Covered:
Home & Garfield Counties

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 71.0% | |
| Safeway | 3 | 38.0 | Safeway, Oklahoma City, OK |
| United Super Market | 3 | 32.0 | Hale-Halsell, Tulsa, OK |
| Circle K Food Stores | 8 | 1.0 | na |
| LEADING INDEPENDENTS: | | 26.0% | |
| The Boys Super Market | 3 | 26.0 | Scrivner, Oklahoma City, OK |
| OTHER GROCERY STORES | 15 | 3.0% | |
| TOTAL | 32 | 100.0% | |

## McALESTER

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 40.0% | |
| Safeway | 1 | 25.0 | (Own) Tulsa, OK |
| Humpty Supermarkets | 1 | 15.0 | (Own) Oklahoma City, OK |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 10.0% | |
| IGA | 1 | 10.0 | Fleming Co., Oklahoma City, OK |
| LEADING INDEPENDENTS: | | 40.0% | |
| Ray's Market | 1 | 10.0 | Fleming Co., Oklahoma City, OK |
| Danny's Grocery | 1 | 10.0 | Hale Halsell Co. |
| Sixth Street Grocery | 1 | 10.0 | Hale Halsell Co. |
| Allen's Market | 1 | 10.0 | na |
| OTHER GROCERY STORES | | 10.0% | |
| Gibson's Market | 1 | 10.0 | na |
| TOTAL | 8 | 100.0% | |

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na - not available

## MUSKOGEE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Weddle | 7 | na | Affiliated Foods, Tulsa, OK |
| Safeway | 2 | na | (Own) Tulsa, OK |
| Gibson Grocery | 1 | na | Affiliated Foods, Tulsa, OK |
| Johnson Foods | 3 | na | Scrivner, Oklahoma City, OK |
| Muskogee Discount Foods | 2 | na | Scrivner, Oklahoma City, OK |
| Dills | 1 | na | Griffins, OK |
| TOTAL | 16 | | |

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## SHAWNEE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Handy Dandy (C) | 3 | na | Tyler & Simpson, Norman, OK |
| Wag-A-Bag, Inc. (C) | 2 | na | Affiliated Foods, Tulsa, OK |
| Happy Snappy (C) | 1 | na | na |
| Kwik Stop (C) | 7 | na | na |
| Love's Country Store | 2 | na | na |
| Shop-N-Go (C) | 1 | na | McLane,Tample, TX |
| Safeway | 1 | na | (Own) Tulsa, OK |
| LEADING INDEPENDENTS: | | | |
| Pratts Foods | 4 | na | Scrivner-Boogaart, Oklahoma City, OK |
| Brannon's IGA | 1 | na | Fleming Food Co., Oklahoma City, OK |
| Al-James IGA | 1 | na | Fleming Food Co., Oklahoma City, OK |
| TOTAL | 23 | | |

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(C) Convenience Stores
na - not available

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# OREGON

## EUGENE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 68.0% | |
| Safeway | 14 | 28.0 | (Own) Portland, OR |
| Albertson's | 7 | 15.0 | West Coast Grocery Co., Salem, OR |
| Fred Meyer | 3 | 13.0 | (Own) Portland, OR |
| McKay's | 5 | 8.0 | West Coast Grocery Co., Salem, OR |
| Drive & Save Foods | 1 | 2.0 | American Strevell, Portland, OR |
| Consumer Warehouse Foods (Fred Meyer) | 1 | 2.0 | (Own) Portland, OR |
| LEADING CONVENIENCE STORE CHAINS: | | 4.0% | |
| 7-Eleven Stores | 16 | * | na |
| Dari-Mart | 21 | 2.0 | American Strevell, Portland, OR |
| Grocery Carts, Inc. | 15 | 2.0 | West Coast Grocery, Inc., Salem, OR |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 11.0% | |
| Waremart | 2 | 7.0 | American Strevell, Portland, OR |
| IGA | 2 | 2.0 | West Coast Grocery, Salem, OR |
| Thriftway | 2 | 2.0 | United Grocers, Portland, OR |
| IGA | 1 | * | American Strevell, Portland, OR |
| LEADING INDEPENDENTS: | | 3.0% | |
| Paramount Markets | 2 | * | Wadhams, Portland, OR |
| D.J.'s Market | 1 | * | na |
| Mark and Pak | 2 | * | na |
| Food Value | 2 | 3.0 | West Coast Grocery, Salem, OR |
| OTHER GROCERY STORES | na | 14.0% | |
| TOTAL | 93+ | 100.0% | |

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na - not available

* Included in "Other Grocery Stores"

## MEDFORD

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 40.4% | |
| Safeway | 3 | 11.2 | (Own) Portland, OR |
| Richard's | 5 | 10.8 | Fleming Companies, Portland, OR |
| Sentry | 2 | 7.2 | United Groceries, Medford, OR |
| U-Mark-It | 2 | 5.4 | Fleming Companies, Portland, OR |
| Albertson's | 1 | 4.8 | West Coast Grocery, Salem, OR |
| Mayfair | 1 | 1.0 | West Coast Grocery, Salem, OR |
| LEADING INDEPENDENTS: | | 43.6% | |
| Sherm's | 2 | 38.4 | Fleming Companies, Portland, OR |
| Shop-Rite | 1 | 2.8 | United Grocers, Medford, OR |
| Quality | 1 | 1.4 | na |
| Van Weys | 1 | 0.6 | na |
| Fair City | 1 | 0.4 | na |
| LEADING CONVENIENCE STORE CHAINS: | | 10.0% | |
| Minute Markets | 8 | 6.0 | na |
| 7-Eleven | 6 | 4.0 | na |
| OTHER GROCERY STORES | 33 | 6.0% | |
| TOTAL | 67 | 100.0% | |

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na - not available

## SALEM

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 60.0% | |
| Safeway | 8 | 27.0 | (Own) Portland, OR |
| Fred Meyer, Inc. | 3 | 15.0 | (Own) Portland, OR |
| Waremart | 2 | 7.0 | American Strevell & United Grocers, Portland, OR |
| McKays Market | 3 | 5.0 | West Coast Grocery, Salem, OR |
| Albertson's | 2 | 4.0 | West Coast Grocery, Salem, OR |
| Prairie Market | 2 | 2.0 | Associated Grocers, Seattle, WA |
| LEADING CONVENIENCE STORE CHAINS: | | 6.0% | |
| Circle K Food Stores | 17 | 3.0 | McClane's, Kent, WA |
| Plaid Pantry | 10 | 2.0 | American Strevell, Portland, OR |
| Little Giant | 2 | 1.0 | West Coast Grocery, Salem, OR |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 19.0% | |
| IGA Stores | 8 | 12.0 | West Coast Grocery, Salem, OR |
| Thriftway | 5 | 7.0 | United Grocers, Portland, OR |
| LEADING INDEPENDENTS: | | 5.0% | |
| Capital Market | 1 | 3.0 | American Strevell, Portland, OR |
| Conner's Central Market | 1 | 2.0 | na |
| OTHER GROCERY STORES | 25 | 10.0% | |
| TOTAL | 89 | 100.0% | |

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na - not available

# PENNSYLVANIA

## ALLENTOWN

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Acme | 21 | na | (Own) Philadelphia, PA |
| Food Lane | 21 | na | Wetterau Foods Dist., Temple, PA |
| Super Fresh Food Markets | 3 | na | A&P, Edison, N.J. & Baltimore, MD |
| 7-Eleven (C) | 27 | na | Southland Dist. Ctr., Falmouth, VA |
| WaWa Markets | 15 | na | Miller & Hartman, Lancaster, PA |
| Weis Markets | 9 | na | (Own) Sunbury, PA |
| Thriftway | 7 | na | Fleming Cos., Inc., (Phila. Div.), Oaks, PA |
| Giant | 1 | na | Super Rite Foods, Inc., Harrisburg, PA |
| Pensupreme | 11 | na | DeWitt Wholesale, Syracuse, NY |
| Jewel T | 4 | na | No Principal Supplier |
| Pathmark | 1 | na | Pathmark, Woodbridge, NJ |
| Clemen's Markets | 4 | na | Perloff Bros., Philadelphia, PA |
| Turkey Hill Minit Market (C) | 12 | na | Miller & Hartman, Lancaster, PA |
| Genuardi's | 1 | na | Fleming Cos., Inc. (Philadelphia Div.) Oaks, PA |
| Redner's Markets, Inc., The Quality Food People | 1 | na | Super Rite Foods, Inc., Harrisburg, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| IGA | 20 | na | Wetterau Foods Dist., Temple, PA |
| Shop Rite | 2 | na | Wakefern Foods Corp., Elizabeth, NJ |
| Quick Chek | 2 | na | General Trading, Carlstadt, NJ |
| LEADING INDEPENDENTS: | | | |
| Traub's Market | 1 | na | Wetterau Foods Dist., Temple, PA |
| Fairground Farmers Big Market | 1 | na | United Associated Grocers, Robesonia, PA |
| Schoenen's | 2 | na | United Associated Grocers, Robesonia, PA |
| Dan Schantz Farm Markets | 2 | na | Wetterau Foods Dist., Temple, PA |
| TOTAL | 168 | | |

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(C) Convenience Stores
na - not available

## ALTOONA

Market Area Covered:
Blair County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 56.0% | |
| Riverside Markets | 11 | 28.0 | Penn Traffic, DuBois, PA |
| Weis | 2 | 20.0 | (Own) Sunbury, PA |
| Giant Eagle | 1 | 5.0 | (Own) Pittsburgh, PA |
| Shop 'N Save | 1 | 3.0 | Charlie Bros., Greensburg, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 36.0% | |
| IGA Foodliners | 7 | 31.0 | Reeves Parvin, Huntingdon, PA |
| Economy A/G | 5 | 3.0 | (Own) Altoona, PA |
| Foodland | 2 | 2.0 | Fox Grocery, Belle Vernon, PA |
| WAREHOUSE OUTLETS: | | | |
| U-Save Warehouse Market | 1 | 7.0% | (Own) & Fox Grocery, Belle Vernon, PA |
| OTHER GROCERY STORES | na | 1.0% | |
| TOTAL | 30+ | 100.0% | |

## EASTON

Market Area Covered:
ABC City & Retail Trading Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Food Lane | 12 | na | Thriftway, Philadelphia, PA |
| A&P | 5 | na | (Own) Montvale, NJ |
| Acme | 6 | na | (Own) Philadelphia, PA |
| Shop-Rite | 5 | na | Wakefern Foods, Elizabeth, NJ |
| Shop Fresh | 2 | na | A&P, Florence, NJ |
| Weis | 1 | na | (Own) Sunbury, PA |
| Giant | 1 | na | (Own) Carlisle, PA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Quik Chek | 5 | na | na |
| Kraussers | 3 | na | na |
| 7-Eleven | 1 | na | na |
| AM/PM Mini Market | 1 | na | na |
| Pensupreme | 3 | na | (Own) Lancaster, PA |
| LEADING INDEPENDENTS: | | | |
| Keppels | 3 | na | Thriftway, Philadelphia |
| OTHER GROCERY STORES | 327 | na | |
| TOTAL | 375 | na | |

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na - not available

## ERIE

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 74.6% | |
| Loblaws | 9 | 36.8 | P.J. Schmitt, Sharon, PA |
| Super Duper | 10 | 19.7 | Jamestown, NY |
| Giant Eagle | 4 | 18.1 | Tamarkin, Younteton, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 19.4% | |
| Shur Fine | 7 | 12.2 | Olean Wholeslae, Olean, NY |
| Golden Dawn | 11 | 7.2 | (Own) Sharon, PA |
| LEADING INDEPENDENTS: | | 1.3% | |
| Country Fair (C) | 17 | 1.3 | P.J. Schmitt, Buffalo, NY |
| OTHER GROCERY STORES | na | 4.7% | |
| TOTAL | 58+ | 100.0% | |

## HARRISBURG

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 73.0% | |
| Giant | 13 | 35.0 | Carlisle Food Mkt., Carlisle, PA |
| Weis | 16 | 30.0 | (Own) Sunbury, PA |
| A&P | 1 | 5.0 | (Own) Baltimore, MD |
| Pathmark | 1 | 3.0 | (Own) Woodbridge, NJ |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 12.0% | |
| Foodtown & Save Rite | 52 | 5.0 | Louis Lehrman, Harrisburg, PA |
| IGA | 6 | 3.0 | G.H. Delp & Co., Temple, PA |
| Super Thrift & WFM | 2 | 2.0 | P.A. & Small, York, PA |
| AG Stores | 63 | 2.0 | Yorktown Whlsl., Grocery Co., Harrisburg, PA |
| CONVENIENCE STORE GROUP: | | 4.0% | |
| Handy Markets | 27 | 2.0 | Convenience Dist., Camp Hill, PA |
| 7-Eleven | 12 | 2.0 | na |
| OTHER GROCERY STORES: | | 11.0% | |
| Kohnaus | 5 | 3.0 | (Own) Mechanicsburg, PA |
| Karns | 4 | 3.0 | (Own) Mechanicsburg, PA |
| Fox's | 4 | 3.0 | (Own) Middleton, PA |
| Pantry Fresh | 2 | 2.0 | (Own) Harrisburg, PA |
| TOTAL | 208 | 100.0% | |

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na - not available
(C) Convenience Stores

## JOHNSTOWN

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Gee Bee | 9 | na | Fox Grocery, Bell Vernon, PA |
| Riverside | 11 | na | Penn Traffic, DuBois, PA |
| Giant Eagle | 6 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Shop & Save | 3 | na | Charlie Bros., Greensburg, PA |
| AG Stores | 13 | na | Economy Wholesale, Altoona, PA |
| IGA/Ideal Food Markets | 2 | na | Reeves Parvin, Huntington, PA |
| LEADING INDEPENDENTS: | | | |
| Conzatti's | 1 | na | DiLallos, Pittsburg, PA |
| Market Basket | 1 | na | Super-Rite, Shiremanstown, PA |
| Koch Cut Rate | 1 | na | Jefferson Wholesale, Punxsutawney, PA |
| McKee's Market | 1 | na | Super-Rite, Shiremanstown, PA |
| Whitfield's Shur-Save | 1 | na | Economy Wholesale, Altoona, PA |
| TOTAL | 49 | | |

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na - not available

## LANCASTER

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Weis Markets | 13 | na | (Own) Sunbury, PA |
| Erb's | 2 | na | Weis Markets, Sunbury, PA |
| Giant Food Stores | 3 | na | (Own) Carlisle, PA |
| Acme | 3 | na | (Own) Philadelphia, PA |
| Oregon Dairy | 1 | na | United Associated Grocers, Robesonia, PA |
| Jay's Super Markets | 1 | na | (Own) York, PA |
| Stauffers of Kissel Hill | 4 | na | United Associated Grocers, Robesonia, PA |
| Bob's Markets | 2 | na | Lewis Lehrman & Son, Shiremanstown, PA |
| Jewel Tea Discount Grocery | 3 | na | (Own) Fogelsville, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| IGA | 10 | na | G.H. Delp Co., Temple, PA |
| Red Rose (incl. Turkey Hill Markets) | 125 | na | Miller & Hartman Wholesale Grocery Co., Lancaster, PA |
| Super Thrift Stores | 1 | na | P.A. & S. Small Co., York, PA |
| AG Food Stores | 70 | na | Associated Wholesalers, York, PA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Pensupreme Grocerettes | 31 | na | DeWitt Wholesale, Syracuse, NY |
| Turkey Hill Minit Market | 49 | na | Miller & Hartman, Lancaster, PA |
| AM/PM Mini Markets | 3 | na | na |
| 7-Eleven | 3 | na | na |
| Rutters Farm Stores | 2 | na | na |
| TOTAL | 326 | | |

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na - not available

## LEBANON

| Market Area Covered:<br>Lebanon County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| **LEADING CHAINS:** | | | |
| Weis | 1 | na | (Own) Sunbury, PA |
| **LEADING CONVENIENCE STORE CHAINS:** | | | |
| Handy Food | 3 | na | na |
| Turkey Hill | 8 | na | na |
| **VOLUNTARY &/OR COOPERATIVE GROUPS:** | | | |
| Associated Wholesalers, Inc. | | | Robesonia, PA |
| **LEADING INDEPENDENTS:** | | | |
| Foodland | 1 | na | Associated Wholesalers, Robesonia, PA |
| Martin's Farm Market | 2 | na | Associated Wholesalers, Robesonia, PA & Super Rite Food, Harrisburg, PA |
| Zweiers | 1 | na | Associated Wholesalers, Robesonia, PA |
| Valley Food Market | 2 | na | Associated Wholesalers, Robesonia, PA |
| **OTHER GROCERY STORES:** | | | |
| Viozzi's | 1 | na | Associated Wholesalers, Robesonia, PA |
| Dutchway | 1 | na | Associated Wholesalers, Robesonia, PA |
| Snavely's | 1 | na | Associated Wholesalers, Robesonia, PA |
| Other Stores | 25 | na | Various Suppliers |
| TOTAL | 46 | | |

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na - not available

## NORRISTOWN

| Market Area Covered:<br>County of Montgomery | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Acme | 4 | na | (Own) Philadelphia, PA |
| Genuardi's | 7 | na | Thriftway Foods, Oaks, PA |
| Jewel T | 1 | na | na |
| 7-Eleven (C) | 8 | na | na |
| Fiore's | 2 | na | Thriftway Foods, Oaks, PA |
| Wa-Wa Food Market | 3 | na | Thriftway Foods, King of Prussia, PA |
| Clemen's Market | 2 | na | Thriftway Foods, Oaks, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Thriftway | 2 | na | (Own) Oaks, PA |
| Shop Rite | 1 | na | (Own) Wakefern Food Corp., Elizabeth, NJ |
| White Marsh Shop & Bag | 1 | na | na |
| LEADING INDEPENDENTS: | | | |
| Colonial Village Meat Market | 2 | na | na |
| Young's Meat Market | 1 | na | na |
| Mariani's | 1 | na | Thrifway Foods, Oaks, PA |
| Clemen's | 1 | na | na |
| Al's Cold Cuts | 1 | na | na |
| DiRenzo's Market | 1 | na | na |
| Zeller's Meats | 1 | na | na |
| Murphy's Food Mart | 1 | na | na |
| Tony's Market | 1 | na | na |
| OTHER GROCERY STORES | 39 | | |
| TOTAL | 80 | | |

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(C) Convenience Stores
na - not available

## READING

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 46.6% | |
| Acme | 7 | 17.9 | (Own) Philadelphia, PA |
| Weis | 6 | 10.9 | (Own) Sunbury, PA |
| Redner's Tiger Markets | 8 | 8.3 | Thriftway, King of Prussia, PA |
| Pathmark | 2 | 7.8 | (Own) Woodbridge, NJ |
| Jewel-T Discount Grocery | 1 | 1.7 | na |
| Turkey Hill Markets (C) | 13 | * | Miller & Hartman, Lancaster, PA |
| Mr. Food (C) | 1 | * | (Own) Lancaster, PA |
| Arco AM/PM (C) | 8 | * | na |
| Giant | 1 | * | Super Rite Foods, Harrisburg, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 31.8% | |
| IGA | 10 | 16.9 | (Own) G.H. Delp Co., Temple, PA |
| Thriftway | 5 | 8.2 | (Own) King of Prussia, PA |
| Shop Rite | 1 | 6.7 | Wakefern Food Corp., Elizabeth, PA |
| Keyco-Keystone | 117 | * | United Assoc. Grocers, Robesonia, PA |
| LEADING INDEPENDENTS: | | | |
| Keystone Meat Markets | 1 | * | United Assoc. Grocers, Robesonia, PA |
| DeCarlo Meat Market | 1 | * | United Assoc. Grocers, Robesonia, PA |
| Weaver's Supermarket | 1 | * | United Assoc. Grocers, Robesonia, PA |
| Pensupreme Grocerette | 9 | * | DeWitt Wholesale Co., Syracuse, NY |
| WaWa | 1 | * | Miller & Hartman, Lancaster, PA |
| Briners Food Market | 1 | * | United Assoc. Grocers, Robesonia, PA |
| OTHER GROCERY STORES | 12 | 21.6% | |
| TOTAL | 206 | 100.0% | |

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na - not available
* Included in "Other Grocery Stores"
(C) Convenience Stores

## SCRANTON

| Market Area Covered:<br>Lackawanna County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 43.1% | |
| Acme Markets (Super Save) | 7 | 18.8 | (Own) King of Prussia, PA |
| Giant Markets | 4 | 10.9 | (Own) Scranton, PA |
| Price Chopper | 3 | 9.9 | na |
| Weis Markets | 1 | 3.5 | (Own) Sunbury, PA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 38.2% | |
| Affiliated Foods | 102 | 20.0 | (Own) Scranton, PA |
| Insalaco's | 5 | 9.0 | Affiliated Foods, Scranton, PA |
| IGA | 2 | 6.2 | G.H. Delp Co., Temple, PA |
| Economy Stores | 11 | 3.0 | Wyoming Valley Dist., Co., Wilkes Barre, PA |
| OTHER GROCERY STORES | na | 18.7% | |
| TOTAL | 135+ | 100.0% | |

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## WILKES-BARRE

| Market Area Covered:<br>City & Retail Trading Zone<br>Luzerne County, PA | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Acme | 14 | na | (Own) King of Prussia, PA |
| Pantry Quik (C) | 6 | na | (Own) Hazelton, PA |
| Giant | 3 | na | (Own) Scranton, PA |
| Weis | 4 | na | (Own) Sunbury, PA |
| AM/PM Mini Markets (C) | 4 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Economy Stores | 50 | na | Wyoming Valley Dist. Co., Wilkes Barre, PA |
| Fairway | 80 | na | Duryea, PA |
| IGA | 4 | na | G.H. Delp Co., Temple, PA |
| LEADING INDEPENDENTS: | | | |
| Insalaco's Supermarkets | 5 | na | Affiliated Foods, Scranton, PA |
| Sunshine Markets | 4 | na | Scott Grocery, Wilkes-Barre, PA |
| Shoprite | 1 | na | Wakefern Food Corp., Elizabeth, NJ |
| Daring's Market | 1 | na | na |
| Johnny's Market | 1 | na | na |
| W.E. Bonnice & Sons | 1 | na | na |
| Fetch's Markets | 2 | na | Affiliated Foods, Scranton, PA |
| TOTAL | 181 | | |

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(C) Convenience Stores
na - not available

## YORK

Market Area Covered:
York County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 47.0% | |
| Weis | 8 | 20.0 | (Own) Sunbury, PA |
| Giant | 3 | 13.0 | Carlisle, PA |
| A&P | 1 | 9.0 | (Own) Baltimore, MD |
| Pathmark | 1 | 3.0 | (Own) Woodbridge, NJ |
| Safeway | 1 | 2.0 | (Own) Landover, MD |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 31.0% | |
| Super Thrift | 75 | 20.0 | P.A. & Small Co., York, PA |
| AG | 150 | 11.0 | Assoc. Wholesalers, Inc., York, PA |
| OTHER GROCERY STORES | na | 22.0% | |
| TOTAL | 239+ | 100.0% | |

# RHODE ISLAND

## NEWPORT

Market Area Covered:
ABC City & Retail Trading Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Almac's | 2 | 21.0% | (Own) Providence, RI |
| Stop & Shop | 1 | 11.0 | (Own) S. Boston, MA |
| Star Market | 1 | 8.0 | (Own) Norwood, MA |
| Morses Food Mart | 1 | 7.0 | (Own) Canton, MA |
| Grand Central | 1 | 6.0 | na |
| A&P | 2 | 4.0 | (Own) Boston, MA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Cumberland Farms | 7 | na | Canton, MA |
| Dairy Mart | 6 | na | Dolep Bros., Chicopee, MA |
| Seven Eleven | 3 | na | |
| Store 2X | 1 | na | |
| TOTAL | 25 | * | |

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na - not available

* Does not add to 100% due to the fact that the percent of sales for certain stores was not available.

## PAWTUCKET

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Almacs | 7 | 31.0% | (Own) E. Providence, RI |
| Star Market | 3 | 13.0 | (Own) Cambridge, MA |
| Stop & Shop | 4 | 10.0 | (Own) S. Boston, MA |
| Wonder/Big Discount | 1 | 3.0 | na |
| OTHER GROCERY STORES: | | | |
| Valueland | 1 | 6.5 | (Own) Canton, MA |
| Dumas Bros. IGA Foodline | 2 | 2.0 | Roger Williams, Cumberland, RI |
| Morse Food Mart | 1 | 1.0 | (Own) Canton, MA |
| Cumberland Farms (C) | 18 | na | na |
| Dairy Mart (C) | 10 | na | na |
| Sunnybrook Farms (C) | 8 | na | na |
| Li'l General (C) | 1 | na | na |
| TOTAL | 56 | * | |

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* Does not add to 100% due to the fact that the percent of sales for certain stores was not available.

Figures are for all of Providence County, RI

na - not available

(C) Convenience Stores

# SOUTH CAROLINA

## ANDERSON

Market Area Covered:
Anderson County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 75.0% | |
| Bi-Lo | 12 | 30.0 | Bi-Lo Warehouse, Mauldin, SC |
| Winn-Dixie | 16 | 24.0 | (Own) Greenville, SC |
| Ingles | 12 | 15.0 | Merchants Distributors, Hickory, NC |
| Kroger | 2 | 4.0 | (Own) Charlotte, NC |
| A&P | 2 | 2.0 | (Own) Charlotte, NC |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 14.0% | |
| Associated Grocers | 200* | 7.0 | (Own) Greenville, SC |
| Dexter Grocery Co. | 200* | 5.0 | (Own) Anderson, SC |
| Thomas & Howard | 50* | 2.0 | (Own) Greenville, SC |
| LEADING INDEPENDENTS: | 11 | 5.0% | |
| OTHER GROCERY STORES (Including Convenience Stores) | 28 | 6.0% | |
| | 533 | 100.0% | |

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* Represents the number of stores served.

## CHARLESTON

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 49.0% | |
| Bi-Lo | 13 | 16.0 | (Own) Mauldin, SC |
| Winn-Dixie | 6 | 14.0 | (Own) Greenville, SC |
| Kroger | 6 | 10.0 | (Own) Charlotte, NC |
| Harris Teeter | 3 | 5.0 | (Own) Charlotte, NC |
| Food Lion | 4 | 4.0 | (Own) Salisbury, NC |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 38.0% | |
| Piggly Wiggly | 22 | 32.0 | (Own) Charleston Hgts., SC |
| Red & White | 7 | 6.0 | Wetterau Food, N. Charleston, SC |
| LEADING INDEPENDENTS: | | 10.0% | |
| Doscher's | 13 | 10.0 | Thomas & Howard, Columbia, SC |
| OTHER GROCERY STORES | na | 3.0% | |
| TOTAL | 74+ | 100.0% | |

## COLUMBIA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 96.5% | |
| Winn-Dixie | 11 | 19.0 | (Own) Greenville, SC |
| Food Lion | 11 | 17.0 | Salisbury, NC |
| Piggly Wiggly | 16 | 17.0 | (Own) Charleston, SC |
| Bi-Lo | 7 | 16.0 | (Own) Greenville, SC |
| Kroger | 5 | 14.0 | (Own) Charlotte, NC |
| Family Mart (A&P) | 2 | 6.0 | MDI, Hickory, NC |
| Giant Food World | 7 | 5.0 | (Own) Columbia, SC |
| A&P | 3 | 2.5 | (Own) Charlotte, NC |
| OTHER GROCERY STORES | na | 3.5% | |
| TOTAL | 62+ | 100.0% | |

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na - not available

## GREENVILLE-SPARTANBURG

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 68.0% | |
| Bi-Lo | 28 | 21.0 | (Own) Mauldin, SC |
| Winn-Dixie | 26 | 20.0 | (Own) Greenville, SC |
| Ingles | 16 | 13.0 | (Own) Asheville, NC |
| Community Cash | 29 | 11.0 | (Own) Spartanburg, SC |
| The Family Mart (Supers) | 2 | 3.0 (1) | (Own) Atlanta, GA |
| Mr. Zip (C) | 32 | * | Spartanburg, SC |
| The Pantry (C) | 41 | * | Greenville, SC |
| Fast Fare (C) | 45 | * | Thomas & Howard, Columbia, SC |
| Handee Food Mart (C) | 17 | * | Greenville, SC |
| Majik Markets (C) | 6 | * | Munford, Atlanta, GA |
| Hometown Food Stores (Supers) | 2 | | |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 4.0% | |
| Associated Grocery | 150 | 4.0 | (Own) Greenville, SC |
| LEADING INDEPENDENTS: | | 3.0% | |
| Kash & Karry | 1 | 3.0 (2) | (Own) Greenville, SC |
| OTHER GROCERY STORES | na | 25.0% | |
| TOTAL | 395+ | 100.0% | |

# SOUTH DAKOTA

## HURON

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 69.5% | |
| Randall Super Valu | 1 | 60.0 | (Own) Mitchell, SD |
| Red Owl | 1 | 9.5 | (Own) Minneapolis, MN |
| LEADING INDPENDENTS: | | 25.5% | |
| Holiday Foods | 1 | 15.0 | na |
| Farmer's Market | 1 | 10.5 | Nash-Finch, SD |
| OTHER GROCERY STORES | na | 5.0% | |
| TOTAL | 4+ | 100.0% | |

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(C) Convenience Stores
na - not available
* Included in "Other Grocers Stores"
(1) - indicates a low percentage figure
(2) - indicates a high percentage figure

## RAPID CITY

| Market Area Covered:<br>Home County, Pennington County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 60.0% | |
| Safeway | 3 | 29.0 | (Own) Denver, CO |
| Family Thrift Center | 2 | 11.0 | Nash-Finch, Rapid City, SC |
| K-Mart | 1 | 10.0 | Super Value, Bismarck, ND |
| Scooper Dooper | 5 | 8.0 | Gen. Whlsl. Co., Norfolk, NE |
| Albertson's | 1 | 2.0 | (Own) Omaha, NE |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 19.0% | |
| Piggly Wiggly | 5 | 19.0 | Prairie Market, Nash-Finch, Rapid City, SD |
| OTHER GROCERY STORES | 8 | 21.0% | |
| TOTAL | 25 | 100.0% | |

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# TENNESSEE

## CHATTANOOGA, TENN.-GA.

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Red Food Stores | 27 | na | (Own) Chattanooga, TN |
| Pruitts Food Town | 11 | na | Ragland Bros., Chattanooga, TN |
| Consumer Warehouse | 3 | na | Bruno's Inc., Birmingham, AL |
| Shop-Rite | 3 | na | Ragland Bros., Chattanooga, TN |
| Kroger | 7 | na | (Own) Atlanta, GA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Golden Gallon | 65 | na | Canton Wholesale, Canton, GA |
| Favorite Markets | 17 | na | Various |
| Majik Markets | 15 | na | Munford Inc., Atlanta, GA |
| Handy Andy Pantries | 12 | na | Various |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Dixie Savings Stores | 240 | na | (Own) Chattanooga, TN |
| TOTAL | 400 | | |

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na - not available

## JACKSON

| Market Area Covered:<br>ABC City Zone, Madison County | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 66.0% | |
| Liberty | 4 | 25.0 | Jackson Fruit Co., Jackson, TN |
| Kroger | 2 | 20.0 | (Own) Memphis, TN |
| Sunflower | 2 | 12.0 | Lewis Groc. Co., Indianola, MS |
| Pic Pac | 2 | 5.0 | Malone & Hyde, Memphis, TN |
| Q-Mart (C) | 9 | 4.0 | P.A. Clayton, Memphis, TN |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 17.0% | |
| E.W. James & Sons | 2 | 10.0 | Malone & Hyde, Memphis, TN |
| Piggly Wiggly | 2 | 6.0 | Malone & Hyde, Memphis, TN |
| Clover Farm | 1 | 1.0 | P.A. Clayton, Memphis, TN |
| LEADING INDEPENDENTS: | | 12.0% | |
| Camp's | 1 | 7.0 | Malone & Hyde, Memphis, TN |
| Super Save | 2 | 3.0 | P.A. Clayton, Memphis, TN |
| C&L Meats | 2 | 1.0 | Malone & Hyde, Memphis, TN |
| Highland Park | 1 | 1.0 | Malone & Hyde, Memphis, TN |
| OTHER GROCERY STORES | 53 | 5.0% | |
| TOTAL | 83 | 100.0% | |

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## KINGSPORT

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 98.0% | |
| Oakwood Super Markets | 6 | 28.0 | na |
| Food City | 4 | 20.0 | na |
| Kroger | 2 | 15.5 | (Own) Kingsport, TN |
| Food Lion | 7 | 15.0 | na |
| Winn-Dixie | 2 | 13.0 | (Own) Greenville, SC |
| Ingles | 1 | 4.5 | na |
| Jiffy Markets | 8 | 1.0 | na |
| Minute Markets | 8 | 1.0 | Pay Cash Groc. Co., Knoxville, TN |
| Roadrunner Markets (C) | 3 | na | na |
| OTHER GROCERY STORES | na | 2.0% | |
| TOTAL | 41+ | 100.0% | |

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(C) Convenience Stores
na - not available

# OAK RIDGE

| Market Area Covered:<br>ABC City Zone (Anderson County) | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 90.0% | |
| A&P | 1 | 25.0 | (Own) Atlanta, GA |
| Kroger | 1 | 24.0 | (Own) Nashville, TN |
| Superior | 1 | 14.0 | Laurel Groc. Co., East Bernhart, KY |
| White Stores | 2 | 13.0 | (Own) Knoxville, TN |
| Winn-Dixie | 1 | 13.0 | (Own) Greenville, SC |
| Ingles Super Market | 1 | 1.0 | (Own) Asheville, NC |
| LEADING INDEPENDENTS: | | 10.0% | |
| Anderson's Hilltop Market | 1 | 5.0 | Malone-Hyde, Nashville, TN |
| Bruner Food Center | 1 | 5.0 | H.T. Hackney, Nashville, TN |
| TOTAL | 9 | 100.0% | |

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(C) Convenience Stores
na - not available
* Included in "Other Grocery Stores"

# TEXAS

## ABILENE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Safeway Stores | 4 | 30.0 | (Own) Dallas, TX |
| Super Duper | 8 | 28.0 | Fleming, San Antonio, TX |
| Alberston's Southco | 1 | 19.0 | Waples West, Lubbock, TX |
| Furr Food | 2 | 8.0 | (Own) Lubbock, TX |
| M-System | 3 | 6.0 | (Own) San Angelo, TX |
| OTHER GROCERY STORES | na | 9.0% | |
| TOTAL | 18+ | 100.0% | |

## AMARILLO

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 97.0% | |
| United Food | 7 | 33.0 | Waples West, Lubbock, TX |
| Albertson's Southco | 2 | 23.0 | Waples West, Lubbock, TX |
| Safeway | 3 | 21.0 | Oklahoma City & Amarillo, TX |
| Furr Food | 10 | 20.0 | (Own) Lubbock, TX |
| OTHER GROCERY STORES | na | 3.0% | |
| TOTAL | 22+ | 100.0% | |

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na - not available

## AUSTIN

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 80.4% | |
| H.E.B. | 17 | 29.1 | (Own) Corpus Christi, TX |
| Safeway | 20 | 21.8 | (Own) Houston, TX |
| Tom Thumb | 9 | 12.5 | (Own) Austin, TX |
| Skaggs | 3 | 9.2 | (Own) Richardson, TX |
| Market Basket | 4 | 4.4 | Warehouse Grocery, Houston, TX |
| Minimax | 3 | 2.7 | Fleming Foods, San Antonio, TX |
| Warehouse Grocery | 2 | .7 | na |
| LEADING INDEPENDENTS: | | 15.0% | |
| Whole Foods | 3 | 5.2 | na |
| Sun Harvest | 2 | 5.0 | na |
| Foodland | 4 | 2.8 | Grocers Supply Co., Houston, TX |
| Kash Karry | 5 | 2.0 | Brenham Wholesale Grocery, Inc., Brenham, TX |
| OTHER GROCERY STORES: | | 4.6% | |
| Ballard's (C) | 13 | 4.6 | McLane Co., Temple, TX |
| Minit Mart | 10 | | McLane Co., Temple, TX |
| 7-Eleven | 42 | | Southland Corp., Tyler, TX |
| Stop & Go | 30 | | McLane Co., Temple, TX |
| Barclays | 12 | | na |
| U-Tote-M (C) | 58 | | McLane Co., Temple, TX |
| Neil One Stop | 8 | | McLane Co., Temple, TX |
| Others | 141 | | Various Suppliers |
| TOTAL | 386 | 100.0% | |

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(C) Convenience Stores
na - not available

## BEAUMONT

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 47.0% | |
| Market Basket | 17 | 30.0 | Grocers Supply, Houston, TX |
| Kroger | 2 | 8.0 | (Own) Houston, TX |
| Safeway | 5 | 5.0 | (Own) Houston, TX |
| Albertson's | 1 | 4.0 | (Own) Richardson, TX |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 35.0% | |
| Grocers Supply | 70 | 15.0 | Houston, TX |
| Affiliated Stores (A-G Stores) | 38 | 7.0 | Dallas, TX |
| Gerland's | 4 | 5.0 | Grocers Supply, Houston, TX |
| Malone & Hyde | 20 | 5.0 | Beaumont, TX |
| Fleming Foods | 9 | 2.0 | Houston, TX |
| Schepp's | 10 | 1.0 | Houston, TX |
| OTHER GROCERY STORES: | | 18.0% | |
| Howard Hatfield | 2 | 6.0 | Affiliated Foods |
| O'Bannion's | 16 | 2.0 | Grocers Supply, Houston, TX |
| Howard's Superettes | 11 | 1.0 | Affiliated Foods |
| Cliff's | 18 | 1.0 | Grocers Supply, Houston, TX |
| Judice's French Market | 2 | 1.0 | Affiliated Foods |
| King-Saver | 1 | 1.0 | na |
| Others | na | 6.0 | na |
| TOTAL | 231+ | 100.0% | |

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## BRYAN

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 75.0% | |
| Safeway | 4 | 32.0 | (Own) Houston, TX |
| Kroger | 2 | 23.0 | (Own) Houston, TX |
| Skaggs | 1 | 12.0 | (Own) Richardson, TX |
| Piggly Wiggly | 2 | 8.0 | Malone & Hyde, Beaumont, TX |
| Winn Dixie | 2 | na | (Own) Dallas, TX |
| OTHER GROCERY STORES (Not including Convenience Stores) | 25 | 25.0% | na |
| TOTAL | 36 | 100.0% | |

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na - not available

## CORPUS CHRISTI

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 87.0% | |
| H.E. Butt | 19 | 50.0 | (Own) Corpus Christi, TX |
| Kroger | 3 | 22.0 | (Own) Houston, TX |
| Handy Andy | 5 | 10.0 | (Own) San Antonio, TX |
| Albertson's | 1 | 4.0 | Malone & Hyde, Beaumont, TX |
| JFM Stores | 3 | 1.0 | L.L. Harris Wholesale, Corpus Christi, TX |
| Foodland | 2 | na | na |
| LEADING INDEPENDENTS: | | 2.0% | |
| Super Mex Stores | 4 | 2.0 | Fleming Wholesale, San Antonio, TX |
| Feudo Foods | 3 | na | na |
| Warehouse Grocery | 3 | na | na |
| OTHER GROCERY STORES: | | 11.0% | |
| Maverick Markets | 37 | 11.0 | Groce-Weardon, Victoria, TX |
| 7-Eleven (C) | 20 | | (Own) Tyler, TX |
| Circle K | 27 | | McLane Wholesale, Temple, TX |
| Independents | na | | L.L. Harris Wholesale, Corpus Christi, Texas & Groce-Weardon, Victoria, TX |
| TOTAL | 127+ | 100.0% | |

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(C) Convenience Stores
na - not available

# EL PASO

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 78.0% | |
| Safeway | 14 | 33.0 | (Own) El Paso, TX |
| Save and Gain--Bag & Save (Furrs) | 8 | 16.0 | (Own) Lubbock, TX |
| Texas Skaggs | 4 | 14.0 | Shorevelle, Albuquerque, NM |
| Furr's Super Mkts. | 6 | 7.0 | (Own) Lubbock, TX |
| Smith's Food King | 4 | 4.0 | Tri-State Assoc., El Paso, TX |
| United Food | 4 | 2.0 | Tri-State Assoc., El Paso, TX |
| Albertson's-Las Cruces | 2 | 2.0 | Albertson's, Denver, CO |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Circle K | 34 | na | McLane Co., Temple, TX |
| 7-Eleven | 19 | na | McLane Co., Temple, TX |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 8.0% | |
| Shur Save | 7 | 8.0 | Tri-State Assoc., El Paso, TX |
| LEADING INDEPENDENTS: | | 13.0% | |
| Big 8 Stores | 7 | 9.0 | Tri-State Assoc., El Paso, TX |
| Food City-El Rancho | 5 | 4.0 | Tri-State Assoc., El Paso, TX |
| OTHER GROCERY STORES | na | 1.0% | |
| TOTAL | 114+ | 100.0% | |

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na - not available

## GALVESTON

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Gerland's Food Fair | 3 | na | Grocers Supply, Houston, TX |
| Kroger's | 1 | na | (Own) Houston, TX |
| Safeway | 2 | na | (Own) Houston, TX |
| Randall's | 1 | na | (Own) Houston, TX |
| LEADING INDEPENDENTS: | | | |
| Alderigi Bros. | 1 | na | na |
| Menotti's | 1 | na | na |
| Micheletti's | 2 | na | na |
| D'Ambra Bros. | 2 | na | na |
| West End Grocery | 1 | na | na |
| Allen's Food King | 1 | na | na |
| OTHER GROCERY STORES: | | | |
| 7-Eleven (C) | 12 | na | Southland Corp., Houston, TX |
| Circle K (C) | 7 | na | na |
| Stop-N-Go | 4 | na | na |
| TOTAL | 38 | | |

## LAREDO

| Market Area Covered:<br>ABC City Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 38.0% | |
| HEB Food Stores | 4 | 30.0 | (Own) Corpus Christi, TX |
| Kroger Food Stores | 1 | 8.0 | (Own) Houston, TX |
| Warehouse | 2 | na | na |
| LEADING INDEPENDENTS: | | 38.0% | |
| Tony's Supermarket | 2 | 38.0 | Various Suppliers |
| Alfredo Santo Grocery | 1 | | |
| El Rio | 1 | | |
| Jitney Jungle | 1 | | |
| Santos River Drive Mall | 1 | | |
| OTHER GROCERY STORES | na | 24.0% | |
| TOTAL | 13+ | 100.0% | |

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(C) Convenience Stores
na - not available

## LUBBOCK

Market Area Covered:
Metropolitan Statistical Area

|  | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: |  | 97.0% |  |
| United | 11 | 38.0 | Waples West, Lubbock, TX |
| Albertson's-Southco | 3 | 31.0 | Waples West, Lubbock, TX |
| Furr Food | 10 | 19.0 | (Own) Oklahoma City, OK |
| Save 'N Gain | 2 | 9.0 | (Own) Lubbock, TX |
| OTHER GROCERY STORES | na | 3.0% |  |
| TOTAL | 26+ | 100.0% |  |

## MIDLAND

Market Area Covered:
Metropolitan Statistical Area

|  | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: |  | 97.0% |  |
| Albertson's Southco | 2 | 38.0 | Waples-West, Lubbock |
| Safeway | 2 | 25.0 | (Own) El Paso, TX |
| Furr Food | 2 | 14.0 | (Own) Lubbock, TX |
| Skaggs Alpha Beta | 1 | 12.0 | na |
| M-System | 3 | 6.0 | (Own) San Angelo, TX |
| OTHER GROCERY STORES | na | 3.0% |  |
| TOTAL | 10+ | 100.0% |  |

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na - not available

## ODESSA

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 91.0% | |
| Albertson's Southco | 2 | 39.0 | Waples-West, Lubbock, TX |
| Furr's | 3 | 15.0 | (Own) Lubbock, TX |
| Skaggs Alpha Beta | 1 | 11.0 | na |
| Serv All Thriftway | 6 | 10.0 | Affiliated Foods, Amarillo, TX |
| Gibson's | 3 | 8.0 | Waples-West, Lubbock, TX |
| Safeway | 3 | 8.0 | (Own) El Paso, TX |
| 7-Eleven (C) | 23 | na | Tri-State, San Antonio,TX |
| Stop 'N Go | 25 | na | na |
| LEADING INDEPENDENTS: | | 3.0% | |
| Everybody's | 2 | 3.0 | Affiliated Foods, Amarillo, TX |
| Odessa Frozen Foods | 1 | na | na |
| OTHER GROCERY STORES | na | 6.0% | |
| TOTAL | 69+ | 100.0% | |

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(C) Convenience Stores
na - not available

## PORT ARTHUR

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 37.0% | |
| Safeway | 4 | 29.0 | (Own) Houston, TX |
| King Saver | 1 | 8.0 | Associated Grocer, Dallas, TX |
| LEADING CONVENIENCE STORE CHAINS: | | 3.0% | |
| Cliff's 7-11 | 8 | 1.5 | Grocers Supply, Houston, TX |
| Howard's Superette | 5 | 0.5 | Grocers Supply, Houston, TX |
| Jif-E-Mart | 4 | 0.5 | Grocers Supply, Houston, TX |
| Mini Mart | 10 | 0.5 | Grocers Supply, Houston, TX |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 52.0% | |
| Market Basket | 11 | 41.0 | Grocers Supply, Houston, TX |
| Discount Foods | 2 | 6.0 | Malone & Hyde, Beaumont, TX |
| Judice's | 2 | 3.0 | Assoc. Grocers, Dallas, TX |
| Howdy Doody | 1 | 2.0 | na |
| Dean's | 1 | na | Grocers Supply, Houston, TX |
| LEADING INDEPENDENTS: | | 8.0% | |
| Piggy Bank | 1 | 3.0 | Grocers Supply, Houston, TX |
| J&L Foods | 1 | 1.0 | Grocers Supply, Houston, TX |
| Andy's Super Market | 1 | 1.0 | Grocers Supply, Houston, TX |
| Blackies Food Market | 1 | 1.0 | Grocers Supply, Houston, TX |
| Cothams | 1 | 1.0 | Assoc. Grocers, Dallas, TX |
| Howdy Dowdy Food Stores | 1 | 0.5 | Grocers Supply, Houston, TX |
| Glen's 7-Eleven | 2 | 0.5 | Grocers Supply, Houston, TX |
| TOTAL | 57 | 100.0% | |

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na - not available

## RIO GRANDE VALLEY

Market Area Covered:
(2 Standard Metropolitan Areas)

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 50.0% | |
| H.E.B. | 14 | 50.0 | (Own) Corpus Christi, TX |
| LEADING INDEPENDENTS: | | 40.0% | |
| Valley Mart | 8 | 15.0 | Groce-Wearden, Donna, TX |
| Calzada's | 2 | 5.0 | Groce-Wearden, Donna, TX |
| Lopez | 10 | 5.0 | Groce-Wearden, Donna, TX |
| Carl's | 5 | 5.0 | Groce-Wearden, Donna, TX |
| King Mart | 4 | 4.0 | Fleming Foods, San Antonio, TX |
| Scurlock's | 3 | 3.0 | Groce-Wearden, Donna, TX |
| Val-U-Fair | 1 | 3.0 | Groce-Wearden, Donna, TX |
| LEADING CONVENIENCE STORE CHAINS: | | 10.0% | |
| 7-Eleven | 47 | 4.0 | na |
| Maverick Markets | 20 | 3.0 | na |
| Sunshine Food Stores | 20 | 3.0 | na |
| OTHER GROCERY STORES | na | | na |
| TOTAL | 139+ | 100.0% | |

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na - not available

## SAN ANGELO

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 82.5% | |
| M-System | 3 | 21.0 | (Own) San Angelo, TX |
| Safeway | 2 | 18.0 | (Own) Dallas, TX |
| Winn-Dixie | 2 | 16.0 | (Own) Fort Worth, TX |
| Albertson's-Southco | 1 | 15.5 | Waples Platter Co., Ft. Worth, TX |
| Furr's | 1 | 12.0 | (Own) Lubbock, TX |
| Skaggs Alpha-Beta | 1 | na | Waples Platter Co., Ft. Worth, TX |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Town & Country | 11 | na | (Own) San Angelo, TX |
| Colonial Food | 5 | na | na |
| LEADING INDEPENDENTS: | | 5.0% | |
| Harry's | 1 | 3.0 | Affiliated Food, Dallas, TX |
| Abbott's | 1 | 2.0 | Affiliated Food, Dallas, TX |
| OTHER GROCERY STORES | na | 12.5% | |
| TOTAL | 28+ | 100.0% | |

## TEMPLE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 52.0% | |
| H.E.B. | 3 | 20.0 | (Own) Corpus Christi, TX |
| Albertson's | 1 | 15.0 | na |
| Safeway | 1 | 12.0 | (Own) Oakland, CA |
| 7-Eleven (C) | 10 | 5.0 | Southland Corp., Dallas, TX |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 24.0% | |
| Piggly Wiggly | 1 | 7.0 | Malone & Hyde, Beaumont, TX |
| David's Supermarket | 1 | 5.0 | McLane Co., Temple, TX |
| Zippy | 7 | 5.0 | McLane Co., Temple, TX |
| Minimax | 1 | 4.0 | Fleming Company |
| Smith's Red & White | 1 | 3.0 | McLane Co., Temple, TX |
| LEADING INDPENDENTS: | | 14.0% | |
| King Saver Food | 2 | 9.0 | Affiliated Grocers, Dallas, TX |
| Strausburger's | 1 | 3.0 | Affiliated Grocers, Dallas, TX |
| Lavendusky | 1 | 1.0 | Affiliated Grocers, Dallas, TX |
| King's Grocery | 1 | 1.0 | McLane Co., Temple, TX |
| OTHER GROCERY STORES | 17 | 10.0% | |
| TOTAL | 48 | 100.0% | |

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(C) Convenience Stores
na - not available

## TYLER

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Brookshires-B-Mart | 11 | na | (Own) Tyler, TX |
| Safeway | 2 | na | (Own) Garland, TX |
| Gibson Discount | 2 | na | (Own) Tyler, TX |
| Kroger | 2 | na | (Own) Irving, TX |
| Skaggs-Alpha Beta | 1 | na | (Own) Dallas, TX |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Cabell's | 6 | na | Southland Corp., Dallas, TX |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Affiliated | na | na | Dallas, TX |
| LEADING INDEPENDENTS: | | | |
| Graham Foods | 3 | na | Affiliated Foods, Dallas, TX |
| Baird's Big Star | 1 | na | Affiliated Foods, Dallas, TX |
| A&B Foods | 1 | na | Affiliated Foods, Dallas, TX |
| Odom Foods | 1 | na | Affiliated Foods, Dallas, TX |
| Lovin's Food | 1 | na | Affiliated Foods, Dallas, TX |
| Phillips | 1 | na | Tyler, TX |
| Whitaker | 1 | na | Tyler, TX |
| OTHER GROCERY STORES | 93 | na | |
| TOTAL | 126 | | |

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## WACO

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 79.0% | |
| H.E.B. Food Stores | 5 | 34.0 | (Own) Corpus Christi, TX |
| Safeway | 5 | 18.8 | (Own) Dallas, TX |
| Skaggs | 1 | 12.2 | (Own) Dallas, TX |
| Sack 'N Save (Miniyards) | 1 | 8.5 | na |
| Winn-Dixie | 1 | 2.5 | (Own) Fort Worth, Tx |
| United Super Market | 1 | 2.0 | Fleming, San Antonio, TX |
| Jewel T | 1 | 1.0 | (Own) |
| LEADING CONVENIENCE STORE CHAINS: | | 9.5% | |
| 7-Eleven | 26 | 6.6 | Southland Corp., Dallas, TX |
| Zippy Food Stores | 20 | 2.9 | McLane Co., Temple, TX |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 10.5% | |
| Piggly Wiggly | 3 | 9.0 | Malone & Hyde, Beaumont, TX |
| A-G Food Stores | 4 | 1.5 | Affiliated Food Stores, Dallas, TX |
| OTHER GROCERY STORES | na | 1.0% | |
| TOTAL | 68+ | 100.0% | |

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na - not available

# VERMONT

## BURLINGTON

Market Area Covered:
Chittenden County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 90.7% | |
| Grand Union | 9 | 40.6 | (Own) Waterford, NY |
| P&C | 4 | 23.4 | Cross Co., White River Jct., VT |
| Martin's | 2 | 19.3 | Hannaford Bros., Portland, ME |
| A&P | 1 | 7.4 | (Own) Springfield, MA |
| LEADING INDEPENDENTS: | | 5.8% | |
| Kennett's IGA | 2 | 5.8 | Wetterau Foods, Keene, NH |
| OTHER GROCERY STORES | 47 | 3.5% | |
| TOTAL | 65 | 100.0% | |

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## RUTLAND

Market Area Covered:
Rutland County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 51.0% | |
| Grand Union | 5 | 25.0 | (Own) Waterford, NY |
| Martin's | 1 | 14.0 | Hannaford Bros., Portland, ME |
| First National | 2 | 12.0 | (Own) Somerville, MA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 3.0% | |
| IGA | 1 | 3.0 | Wetterau Foods, Keene, NH |
| LEADING INDEPENDENTS: | | 6.0% | |
| California Fruit | 1 | 3.0 | The Cross Co., White River Jct., VT |
| Humiston Market Place | 1 | 2.0 | The Cross Co., White River Jct., VT |
| South End Food Market | 1 | 1.0 | The Cross Co., White River Jct., VT |
| OTHER GROCERY STORES | 45 | 40.0% | |
| TOTAL | 57 | 100.0% | |

# VIRGINIA

## DANVILLE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Food World | 1 | na | (Own) High Point, NC |
| Winn-Dixie | 2 | na | (Own) Raleigh, NC |
| Big Star | 1 | na | Colonial Stores, Raleigh, NC |
| Piggly Wiggly | 2 | na | Malone & Hyde, Salem, VA |
| Food Lion | 3 | na | (Own) Salisbury, NC |
| Hop In (C) | 2 | na | Thomasson Howard, Hickory, NC |
| Kwik Stop (C) | 3 | na | J.W. Wyatt & Co., Danville, VA |
| Quick-N-Plenty (C) | 2 | na | J.W. Wyatt & Co., Danville, VA |
| Quick-Chek (C) | 2 | na | J.W. Wyatt & Co., Danville, VA |
| LEADING INDEPENDENTS: | | | |
| Wyatt & Hall Foods | 1 | na | J.W. Wyatt & Co., Danville, VA |
| Midtown | 1 | na | J.W. Wyatt & Co., Danville, VA |
| South Main Produce | 1 | na | J.W. Wyatt & Co., Danville, VA |
| Eddie's Supermarket | 1 | na | Richfood, Richmond, VA |
| Old Dutch | 4 | na | J.W. Wyatt & Co., Danville, VA |
| OTHER GROCERY STORES | 105 | na | |
| TOTAL | 131 | | |

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(C) Convenience Stores
na - not available

## LYNCHBURG

| Market Area Covered:<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 94.0% | |
| Food World/Harris Teeter | 6 | 34.0 | (Own) Charlotte, NC |
| Kroger | 4 | 23.0 | (Own) Roanoke, VA |
| Food Lion | 4 | 16.0 | (Own) Salisbury, NC |
| Winn-Dixie | 5 | 14.0 | (Own) Raleigh, NC |
| Big Star Markets | 1 | 7.0 | Colonial Store, Raleigh, NC |
| A&P | 1 | * | (Own) Richmond, VA |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| 7-Eleven | 7 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Quality Good Co-op | na | * | (Own) Mad. Hts., VA |
| Malone & Hyde | | * | (Own) Salem, VA |
| Fleming Foods | | * | (Own) Waynesboro, VA |
| LEADING INDEPENDENTS: | | | |
| Burley's Market | 2 | na | Quality Foods, Madison Hts., VA |
| Miles Food Markets | 3 | na | Quality Foods, Madison Hts., VA |
| Quik-E Food Stores | 7 | na | Quality Foods, Madison Hts., VA |
| Lee and Moss Fairway Market | 1 | na | Madison Hts., VA |
| Stop-Iu Food Stores | 4 | na | (Own) Ferrum, VA |
| OTHER GROCERY STORES | na | 6.0% | |
| TOTAL | 44+ | 100.0% | |

## NEWPORT NEWS

| Market Area Covered:<br>Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 68.0% | |
| Farm Fresh | 5 | 21.6 | Richfoods, Richmond, VA |
| Giant Open Air | 5 | 13.5 | (Own) Norfolk, VA |
| Pantry Pride | 6 | 10.2 | (Own) Baltimore, MD |
| Be-Lo | 6 | 6.7 | Economy Stores, Norfolk, VA |
| Safeway | 5 | 6.7 | (Own) Richmond, VA |
| Food Lion | 4 | 5.3 | (Own) Salisbury, NC |
| A&P | 4 | 2.9 | (Own) Richmond, VA |
| Winn-Dixie | 1 | 1.1 | (Own) Raleigh, NC |
| LEADING INDEPENDENTS: | | 15.5% | |
| Low Smith | 6 | 15.5 | Richfoods, Richmond, VA<br>(Div. Grant Open Air) |
| OTHER GROCERY STORES | 164 | 16.5% | |
| TOTAL | 206 | 100.0% | |

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na - not available

* Including in "Other Grocery Stores"

## NORFOLK-VA. BEACH-PORTSMOUTH, VA.-N.C.

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 30.3% | |
| Food Lion | 14 | 7.8 | (Own) Salisbury, NC |
| 7-Eleven (C) | 142 | 6.0 | Tidewater Whlsl., Norfolk, VA |
| Safeway | 8 | 4.9 | (Own) Richmond, VA |
| Pantry Pride | 7 | 4.5 | (Own) Baltimore, MD |
| A&P | 10 | 4.4 | (Own) Richmond, VA |
| Winn-Dixie | 4 | 2.7 | (Own) Raleigh, NC |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 57.8% | |
| Richmond Food Stores, Inc., total | | | |
| (including: Farm Fresh | 11 | 20.6 | Richmond Food Stores |
| Boulevard) | 2 | 0.7 | Richmond Food Stores |
| Economy Stores Inc., total | 160 | | (Own) Norfolk, VA |
| (including: Be-Lo | 30 | 12.0 | Economy Stores, Norfolk, VA |
| Earles) | 8 | 7.1 | Economy Stores, Norfolk, VA |
| Giant Open Air | 12 | 16.4 | Bisese & Consol Inc., Norfolk, VA |
| Tinee Giant (C) | 29 | 1.0 | Bisese & Consol Inc., Norfolk, VA |
| OTHER GROCERY STORES | 345 | 11.9% | |
| TOTAL | 782 | 100.0% | |

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(C) Convenience Stores

## PETERSBURG-COLONIAL HEIGHTS

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 46.9% | |
| Safeway Stores | 5 | 22.5 | (Own) Chester, VA |
| A&P | 1 | 6.5 | (Own) Richmond, VA |
| Pantry Pride | 1 | 6.3 | (Own) Richmond, VA |
| Winn-Dixie | 2 | 4.2 | na |
| 7-Eleven (C) | 11 | 1.8 | na |
| Food Lion | 2 | na | (Own) Salisbury, NC |
| Sun Supermarkets | 1 | na | (Own) Richmond, NC |
| LEADING INDEPENDENTS: | | 13.8% | |
| Ukrops | 3 | 13.8 | Richfood, Richmond, VA |
| Harrison's Market | 1 | | |
| Produce Center #2 | 1 | | |
| Hines Food Center | 1 | | |
| Liberty Food Market | 1 | | |
| Young's Super Market | 1 | | |
| Edgehill Super Market | 1 | | |
| Ettrick Super Market | 1 | | |
| Julian A. Pugh's Super Market | 1 | | |
| Lou Weiner's Food Market | 1 | | |
| Dinwiddie Super Market | 1 | | |
| I.G.A. Blue Ridge Grocery | 1 | | |
| Robinson's Market | 1 | | |
| Try Me Grocery | 1 | | |
| Fifth Ward Grocery | 1 | | |
| Moogalian's Super Market | 1 | | |
| Matoaca Supermarket | 1 | | |
| Goin's Bi-Rite Food Stores | 1 | | |
| Produce Center #1 | 1 | | |
| Harrison's #1 | 1 | | |
| Crockett's Food Center | 1 | | |
| Star Value Supermarket | 1 | | |
| Bristow's Self-service Market | 1 | | |
| Wallace's Grocery | 1 | | |
| OTHER GROCERY STORES | 49 | 39.3% | |
| TOTAL | 98 | 100.0% | |

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(C) Convenience Stores
na - not available

## RICHMOND

Market Area Covered:
Retail Trading Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 49.0% | |
| Safeway | 26 | 25.0 | (Own) Richmond, VA |
| A&P | 11 | 11.0 | (Own) Richmond, VA |
| Winn-Dixie | 5 | 3.0 | (Own) Raleigh, NC |
| VOLUNTARY &/OR COOPERATIVE GROUPS*: | | 42.0% | |
| Richfood: | | | (Own) Richfood, Richmond, VA |
| Ukrops | 13 | 29.0 | |
| Pantry Price | 5 | 5.0 | |
| Lukhards | 6 | 3.0 | |
| Foodtown | 3 | 2.0 | |
| Farm Fresh | 2 | 2.0 | |
| Siegels | 5 | 1.0 | |
| OTHER GROCERY STORES | 5 | 9.0% | |
| TOTAL | 81 | 100.0% | |

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## ROANOKE

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 95.0% | |
| Kroger | 12 | 47.0 | (Own) Salem, VA |
| Food Lion | 5 | 14.0 | (Own) Salisbury, NC |
| Mick-or-Mack | 11 | 11.0 | (Own) Salem, VA |
| Winn-Dixie | 7 | 11.0 | (Own) Raleigh, NC |
| Food World | 5 | 9.0 | Malone & Hyde, Salem, VA |
| Sureway Bestway | 5 | 2.0 | Malone & Hyde, Salem, VA |
| Thriftway | 3 | 1.0 | Richmond Foods, Richmond, VA |
| OTHER GROCERY STORES | 226 | 5.0% | |
| TOTAL | 274 | 100.0% | |

# WASHINGTON

## BREMERTON

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Shop-Rite | 3 | na | West Coast Grocery, Tacoma, WA |
| Safeway | 4 | na | (Own) Bellevue, WA |
| Albertson's | 3 | na | West Coast Grocery, Tacoma, WA |
| Prairie Market | 2 | na | Tradewell, Inc., Kent, WA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Thriftway | 5 | na | Assoc. Grocers, Seattle, WA |
| Mark-It Foods | 2 | na | Assoc. Grocers, Seattle, WA |
| IGA | 2 | na | American Strevel, Kent, WA |
| TOTAL | 21 | | |

## LONGVIEW

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Minit Mart | 7 | na | na |
| Safeway (see Keils'/Safeway) | 3 | na | (Own) |
| Fred Meyer | 1 | na | (Own) |
| Prairie Market | 1 | na | Tradewell, Kent, WA |
| Keil's/Safeway | 1 | na | (Own) |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Thriftway | 1 | na | N.W. Grocers |
| LEADING INDEPENDENTS: | | | |
| Shop 'n Kart | 2 | na | Assoc. Groc., Seattle, WA |
| Market Place | 1 | na | Assoc. Groc., Seattle, WA |
| Park & Shop Foods | 1 | na | IGA, Kent, WA |
| TOTAL | 18 | na | |

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na - not available

## SPOKANE

Market Area Covered:
Metropolitan Spokane County

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 74.0% | |
| Safeway | 12 | 27.0 | (Own) Spokane, WA |
| Rosauer's | 12 | 21.0 | WRM, Spokane, WA |
| Albertson's | 7 | 17.0 | West Coast, Spokane, WA |
| Tidyman's | 3 | 6.0 | West Coast, Spokane, WA |
| Circle K (C) | 8 | 1.5 | West Coast, Spokane, WA |
| 7-Eleven (C) | 17 | 1.5 | McLane NW, Tacoma, WA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 14.0% | |
| Excell | 9 | 6.0 | URM, Spokane, WA |
| Inland Market (Starco) | 6 | 5.5 | West Coast, Spokane, WA |
| IGA | 3 | 1.0 | West Coast, Spokane, WA |
| Thrift | 6 | 1.0 | URM, Spokane, WA |
| Food Mart | 2 | 1.0 | URM, Spokane, WA |
| Empire | 2 | 0.5 | West Coast, Spokane, WA |
| LEADING INDEPENDENTS | 90 | 12.0% | |
| TOTAL | 177 | 100.0% | |

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(C) Convenience Stores

# TACOMA

| Market Area Covered:<br>Retail Trading Zone<br>(Pierce and South King Counties) | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 68.0% | |
| Safeway | 23 | 30.0 | (Own) Bellevue, WA |
| Piggly Wiggly | 7 | 10.0 | West Coast Grocery, Tacoma, WA |
| Lucky Stores | 7 | 8.0 | West Coast Grocery, Tacoma, WA |
| Fred Meyer | 4 | 6.0 | (Own) Portland, OR |
| Prairie Markets | 2 | 6.0 | Tradewell, Kent, WA |
| 7-Eleven (C) | 39 | 3.0 | McClean Northwest, Tacoma, WA |
| IGA | 4 | 3.0 | Fleming Companies, Portland, OR |
| The Family Grocers | 1 | 1.0 | Assoc. Grocers, Seattle, WA |
| Albertson's | 4 | 1.0 | West Coast Grocery, Tacoma, WA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 7.0% | |
| NFC (Neighborhood Food Centers/ (Shoprite) | 5 | 4.0 | West Coast Grocery, Tacoma, WA |
| Uddenbergs Thriftway | 2 | 3.0 | Assoc. Grocers, Seattle, WA |
| LEADING INDEPENDENTS: | | 7.0% | |
| Manley's | 1 | 4.0 | West Coast Grocery, Tacoma, WA |
| Lively Markets | 3 | 1.0 | na |
| Save Mart Market | 1 | 1.0 | Assoc. Grocers, Seattle, WA |
| Johnny's | 1 | 1.0 | Assoc. Grocers, Seattle, WA |
| Larry's | 1 | na | na |
| Mega Foods 2 | 2 | na | na |
| OTHER GROCERY STORES: | | 18.0% | |
| Mark-It Foods | 5 | 10.0 | Assoc. Grocers, Seattle, WA |
| Mark 'N Pak (Holiday Foods) | 2 | 2.0 | Assoc. Grocers, Seattle, WA |
| Mark 'N Save | 1 | 1.0 | West Coast Groc., Tacoma, WA |
| Others, Military, etc. | 24 | 5.0 | Direct and assorted |
| TOTAL | 134 | 100.0% | |

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(C) Convenience Stores
na - not available

## WALLA WALLA

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 44.0% | |
| Safeway | 3 | 30.0 | (Own) Spokane, WA |
| Albertson's | 1 | 14.0 | Roundup Co., Spokane, WA |
| LEADING INDEPENDENTS: | | 56.0% | |
| Danielson's Foods | 1 | 15.0 | United Grocers, Portland, OH |
| Fleenors | 2 | 13.0 | U.R.M., Spokane, WA |
| Wade's Thriftway | 1 | 9.0 | Assoc. Groc, Seattle & Yakima, WA |
| Food 4 Less | 1 | 8.0 | U.R.M., Spokane, WA |
| Andy's Market | 1 | 6.0 | U.R.M., Spokane, WA |
| Milton Freewater IGA | 1 | 5.0 | Roundup Co., Spokane, WA |
| TOTAL | 11 | 100.0% | |

## WENATCHEE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Safeway | 2 | na | (Own) Bellevue, WA |
| Albertson's | 1 | na | Roundup Co., Spokane, WA |
| Buttrey Foods | 1 | na | Jewel Co., Boise, ID |
| Prairie Market | 1 | na | Tradewell, Inc., Kent, WA |
| Top Foods | 1 | na | Associated Grocers, Seattle, WA |
| 7-Eleven (C) | 3 | na | Amer. Whlsl. Groc. Co., Kent, WA |
| LEADING INDEPENDENTS: | | | |
| Hometown Market (C) | 1 | na | Roundup Co., Spokane, WA |
| Fleenor's | 1 | na | Roundup Co., Spokane, WA |
| Gordon's Foods | 1 | na | Associated Grocers, Seattle, WA |
| Plaza Super Jet (C) | 1 | na | U.R.M., Spokane, WA |
| C.C. Mini Marts (C) | 4 | na | McCleans Grocery Distributors, Tacoma, WA |
| OTHER GROCERY STORES | 23 | na | |
| TOTAL | 40 | | |

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(C) Convenience Stores
na - not available

# WEST VIRGINIA

## BLUEFIELD

| Market Area Covered: ABC Retail Trading Zone (Mercer County, W.Va. & Tazewell County, Va.) | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 71.0% | |
| Kroger | 5 | 24.0 | (Own) Salem, VA |
| Acme | 5 | 23.0 | (Own) North Tazewell, VA |
| Deskins | 7 | 21.0 | (Own) North Tazewell, VA |
| A&P | 1 | 3.0 | (Own) Richmond, VA |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 14.0% | |
| IGA | 8 | 14.0 | Virginia Foods, Fall Mills, VA |
| OTHER GROCERY STORES | na | 15.0% | |
| TOTAL | 26+ | 100.0% | |

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## CHARLESTON

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 65.0% | |
| Kroger | 14 | 62.0 | (Own) Salem, VA |
| Super Valu | 3 | 3.0 | (Own) Xenia, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 5.0% | |
| Foodland | 12 | 5.0 | Wetterau, Milton, WV |
| IGA | 3 | na | Wetterau, Milton, WV |
| LEADING INDEPENDENTS: | | 28.0% | |
| Fas-Chek | 14 | 20.0 | Malone & Hyde, Lexington, KY |
| Key Markets & Little Giant Mkts. | 24 | 8.0 | Creasey Co., Kenova, WV |
| OTHER GROCERY STORES | na | 2.0% | |
| TOTAL | 71+ | 100.0% | |

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na - not available

## HUNTINGTON-ASHLAND, W. VA.-KY.-OHIO

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 22.8% | |
| Kroger | 6 | 12.1 | (Own) Salem, VA |
| Big Bear | 4 | 10.7 | (Own) Columbus, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 4.0% | |
| IGA | 9 | 4.0 | McLain Grocery, Massillon, OH |
| LEADING INDEPENDENTS: | | 55.6% | |
| Tradewell | 7 | 15.0 | Service Wholesale, Colloden, WV |
| Foodland | 6 | 10.0 | Service Sales, Inc. |
| B & B Market | 1 | 9.7 | Assoc. Groc., Huntington, WV |
| Gateway | 5 | 7.0 | Creasey Co., Kenova, WV |
| Food King | 7 | 7.0 | Assoc. Groc., Huntington, WV |
| Key Markets | 11 | 5.9 | Creasey Co., Kenova, WV |
| Thriftway | 6 | 1.0 | Assoc. Groc., Huntington, WV |
| OTHER GROCERY STORES | 100 | 17.6% | |
| TOTAL | 162 | 100.0% | |

## WHEELING

| Market Area Covered: Metropolitan Statistical Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 34.0% | |
| Kroger | 7 | 30.5 | (Own) Solon, OH |
| A&P | 1 | 3.5 | (Own) Columbus, OH |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 36.3% | |
| Foodland | 4 | 30.3 | Fox Groc. Co., Belle Vernon, PA |
| IGA | 7 | 6.0 | (Own) Massillon, OH |
| LEADING INDEPENDENTS: | | 22.9% | |
| Convenient Foods | 12 | 6.0 | Wheeling Whlsl. Groc., Wheeling, WV |
| Giant Eagle | 1 | 5.0 | (Own) Pittsburgh, PA |
| New Coop | 10 | 4.5 | Wheeling Whlsl. Groc., Wheeling, WV |
| Hart's | 1 | 3.3 | Big Bear, Columbus, OH |
| State Foods | 4 | 2.6 | Wheeling Whlsl. Groc., Wheeling, WV |
| Super Dollar | 2 | 1.5 | McKeesport, PA |
| Shop 'N Save | 3 | na | Charley Bros., New Stanton, PA |
| Lawson's | 4 | na | na |
| OTHER GROCERY STORES | na | 6.8% | |
| TOTAL | 56+ | 100.0% | |

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na - not available

# WISCONSIN

## APPLETON

| Market Area Covered:<br>Counties of Calumet, Outagamie and Winnebago | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 31.0% | |
| Piggly Wiggly | 2 | 11.0 | Schultz Save-O-Stores, Sheboygan, WI |
| Save-U-Foods | 6 | 5.0 | Schultz Save-O-Stores, Sheboygan, WI |
| Red Owl | 2 | 5.0 | Green Bay, WI & Hopkins, MN |
| Kohl's | 2 | 4.0 | (Own) Milwaukee, WI |
| Sentry | 2 | 4.0 | Godfrey Co., Waukesha, WI |
| Super Valu | 1 | 2.0 | (Own) Green Bay, WI |
| LEADING INDEPENDENTS: | | 19.0% | |
| Town & Country Mkts. | 3 | 11.0 | S.C. Shannon, Appleton, WI |
| Gordy's Food Fair | 2 | 6.0 | S.C. Shannon, Appleton, WI |
| Park 'N Market | 4 | 2.0 | S.C. Shannon, Appleton, WI |
| WAREHOUSE OPERATIONS: | | 24.0% | |
| Cub Foods | 1 | 13.0 | Super Valu, Hopkins, MN |
| Pick 'N' Save | 1 | 12.0 | Roundy's United Foods, Little Chute, WI |
| OTHER GROCERY STORES | na | 26.0% | |
| TOTAL | 26+ | 100.0% | |

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na - not available

## GREEN BAY

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 76.0% | |
| Cub Foods | 2 | 42.0 | Super Valu, Green Bay, WI |
| Sure Way | 10 | 23.0 | Carpenter Cook, Menominee, MI |
| Lindy's | 3 | 8.0 | Red Owl, Green Bay, WI |
| Kohl's | 1 | 3.0 | (Own) Milwaukee, WI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 15.0% | |
| Sentry | 3 | 8.0 | Godfrey Co., Waukesha, WI |
| Super Ron's | 4 | 4.0 | S.C. Shannon, Appleton, WI |
| Red Owl Agency Stores | 2 | 3.0 | Red Owl, Green Bay, WI |
| LEADING INDEPENDENTS: | | 1.0% | |
| Biebel's | 1 | 1.0 | United Grocers, Little Chute, WI |
| OTHER GROCERY STORES | 38 | 8.0% | |
| TOTAL | 64 | 100.0% | |

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## LA CROSSE

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 22.7% | |
| Copps IGA | 1 | 13.5 | (Own) Stevens Point, WI |
| Roundy's | 1 | 5.1 | Milwaukee, WI |
| Super Valu | 1 | 4.0 | Green Bay, WI |
| Fairway | 1 | 0.1 | na |
| Cub Foods | 1 | na | Super Valu, Green Bay, WI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 68.1% | |
| IGA | 26 | 68.1 | Gateway Foods, La Crosse, WI |
| OTHER GROCERY STORES | na | 9.2% | |
| TOTAL | 31+ | 100.0% | |

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na - not available

## MADISON

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 76.0% | |
| Eagle | 8 | 30.0 | Lucky Stores, Milan, IL |
| Kohl's | 6 | 25.0 | (Own) Milwaukee, WI |
| Sentry | 7 | 20.0 | (Own) Milwaukee, WI |
| Cub Foods | 1 | 1.0 | Super Valu, Green Bay, WI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 16.0% | |
| Roundy's | 3 | 6.0 | na |
| IGA | 6 | 5.0 | Gateway Foods, La Crosse, WI |
| Piggly Wiggly | 3 | 4.0 | Schultz Sav-O-Stores, Sheboygan, WI |
| Super Valu | 1 | 1.0 | Super Valu, Green Bay, WI |
| OTHER GROCERY STORES (Stop'N Go, Open Pantry, PDQ, plus all others) | 50 | 8.0% | Various |
| TOTAL | 85 | 100.0% | |

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## RACINE

Market Area Covered:
ABC City Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Piggly Wiggly | 5 | na | (Own) Sheboygan, WI |
| Sentry | 2 | na | (Own) Waukesha, WI |
| Kohl's | 3 | na | (Own) Milwaukee, WI |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Roundy's | 1 | na | Milwaukee, WI |
| Super Valu | 2 | na | Green Bay, WI |
| LEADING INDEPENDENTS: | | | |
| Matranga | 1 | na | na |
| Chopyak | 1 | na | na |
| Randall's Country Market | 1 | na | Super Valu, Green Bay, WI |
| OTHER GROCERY STORES: | | | |
| Open Pantry | 11 | na | Racine, WI |
| PDQ | 3 | na | na |
| White Hen | 1 | na | na |
| TOTAL | 31+ | | |

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na - not available

## SHEBOYGAN

| Market Area Covered: Counties of Sheboygan, Calumet Ozaukee, Manitowac, Washington and Fond du'Lac | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Piggly Wiggly | 6 | na | Schultz Sav-O Stores, Sheboygan, WI |
| Sentry | 1 | na | Godfrey Co. |
| Austins | 2 | na | United Grocers |
| LEADING INDEPENDENTS: | | | |
| Park & Shop | 2 | na | Shannon, Aplleton, WI |
| Bill's Red Owl | 1 | na | Red Own, Green Bay, WI |
| Leudke's | 1 | na | Schultz Sav-O-Stores, Sheboygan, WI |
| Zimmermann's | 1 | na | Shannon, Appleton, WI |
| OTHER GROCERY STORES: | | | |
| Triangle Market | 1 | na | Schultz Sav-O-Stores, Sheboygan, WI |
| Food Farms | 3 | na | Schultz Sav-O-Stores, Sheboygan, WI |
| Sunnyside Foods | 1 | na | Schultz Sav-O-Stores, Sheboygan, WI |
| Bitter-Newuman | 1 | na | Schultz Sav-O-Stores, Sheboygan, WI |
| WAREHOUSE OPERATIONS: | | | |
| Park & Save | 1 | na | Shannon, Appleton, WI |
| Sav-U-Warehouse | 1 | na | Schultz Sav-O-Stores, Sheboygan, WI |
| TOTAL | 22 | | |

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na - not available

# WYOMING

## CASPER

Market Area Covered:
ABC City & Retail Trading Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Mini Marts | 12 | na | McLane Western, Denver, CO |
| Safeway | 3 | na | (Own) Denver, CO |
| Albertson's | 2 | na | Western Grocers, Denver, CO |
| Buttrey Foods | 2 | na | A.G., Denver, CO |
| Smith's Foods | 1 | na | na |
| LEADING INDEPENDENTS: | | | |
| OTHER GROCERY STORES: | | | |
| Brattis Grocery | 1 | na | A.G., Denver, CO |
| Grant Street Grocery | 1 | na | A.G., Denver, CO |
| Gill's Market | 1 | na | A.G., Denver, CO |
| Hutsells Pay 'N Save | 1 | na | A.G., Denver, CO |
| 7-Eleven (C) | 2 | na | A.G., Denver, CO |
| Jerry's Market | 1 | na | A.G., Denver, CO |
| TOTAL | 27 | | |

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## CHEYENNE

Market Area Covered:
ABC City & Retail Trading Zone

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Mini-Mart (C) | 9 | na | Casper, Wyoming Headquarters |
| Safeway | 4 | na | (Own) Denver, CO |
| Albertson's | 2 | na | (Own) Boise, CO |
| National Foods | 2 | na | (Own) Denver, CO |
| Buttrey Foods | 2 | na | Billings, MT |
| LEADING INDEPENDENTS: | | | |
| Super Foods (AG) | 1 | na | Assoc. Groc., Cheyenne, WY |
| TOTAL | 20 | | |

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na - not available
(C) Convenience Stores

## LARAMIE

| Market Area Covered:<br>ABC City & Retail Trading Zone | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| **LEADING CHAINS:** | | | |
| Safeway Stores, Inc. | 1 | na | (Own) Denver, CO |
| Albertson's | 1 | na | Denver, CO |
| Buttrey Food Stores | 1 | na | (Own) Gret Falls, MT |
| Mini-Mart | 3 | na | (Own) Casper, WY |
| 7-Eleven | 1 | na | (Own) Denver, CO |
| Gibson's Discount Center | 1 | na | A.G., Denver, CO |
| **LEADING INDEPENDENTS:** | | | |
| Ideal Super Stores | 1 | na | A.G., Denver, CO |
| Green's Grocery | 1 | na | A.G., Denver, CO |
| West Laramie Fly Store | 1 | na | A.G., Denver, CO |
| Rainbow Grocery | 1 | na | A.G., Denver, CO |
| Foster's Country Store | 1 | na | A.G., Denver, CO |
| TOTAL | 13 | | |

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na - not available

# CANADA

## CALGARY

Market Area Covered:
Census Metropolitan Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Mac's | 65 | na | Western Grocers |
| Safeway | 32 | na | (Own) Vancouver, B.C. |
| 7-Eleven | 46 | na | (Own) Burnaby, B.C. |
| Food Barn (Safeway) | 2 | na | (Own) Vancouver, B.C. |
| Food For Less (Safeway) | 2 | na | (Own) Vancouver, B.C. |
| Woodwards | 3 | na | Associated Grocers |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Calgary Co-op | 12 | na | Federated Cooperative, Calgary |
| Super Valu | 4 | na | Western Grocers |
| IGA | 1 | na | Horne & Pitfield, Edmonton |
| Allwest Supermarkets Ltd. | 6 | na | Assoc. Grocers, Calgary |
| Food City | 6 | na | Assoc. Grocers, Calgary |
| Food Vale | 1 | na | Assoc. Grocers, Calgary |
| Red Rooster Food Store | 7 | na | Horne & Pitfield, Edmonton |
| Food Giant | 2 | na | Horne & Pitfield, Edmonton |
| LEADING INDEPENDENTS: | | | |
| Loaf'N Jug Foods | 6 | na | Assoc. Grocers, Calgary |
| TOTAL | 195 | | |

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na - not available

## HAMILTON

Market Area Covered:
Census Metropolitan Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Dominion | 1 | na | (Own) Toronto, Ontario |
| Loblaws | 2 | na | (Own) Toronto, Ontario |
| Miracle Food Mart (Steinbergs) | 12 | na | (Own) Toronto, Ontario |
| A&P | 6 | na | (Own) Toronto, Ontario |
| Food City | 3 | na | Oshawa Group, Toronto, Ontario |
| Red & White | 3 | na | (Own) Toronto, Ontario |
| Zehrs | 2 | na | (Own) Toronto, Ontario |
| No Frills (Loblaws) | 2 | na | (Own) Toronto, Ontario |
| Mr. Grocer | 4 | na | Willet Food Ltd., Kitchener, Ontario |
| Valdi (Miracle Food Mart) | 6 | na | (Own) Toronto, Ontario |
| New Dominion (A&P) | 5 | na | (Own) Toronto, Ontario |
| Super Tops | 3 | na | (Own) Tronoto, Ontario |
| VOLUNTARY &/OR COOPEATIVE GROUPS: | | | |
| IGA | 8 | na | Oshawa Group, Oshawa, Ontario |
| LEADING INDEPENDENTS: | | | |
| Fortino | 4 | na | na |
| Commisso | 1 | na | na |
| Lo Food | 1 | na | na |
| TOTAL | 63 | | |

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na - not available

## KITCHENER

| Market Area Covered:<br>Census Metropolitan Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 79.1% | |
| Zehrs | 15 | 79.1 | (Own) Cambridge, Ontario |
| Dutch Boy | 6 | | Oshawa Group, Oshawa, Ontario |
| Miracle Food mart | 3 | | Steinberg's, Toronto, Ontario |
| Food Barn | 1 | | Steinberg's, Toronto, Ontario |
| Mr. Grocer | 1 | | Willet Food Ltd., Kitchener, Ontario |
| A&P | 1 | | (Own) Toronto, Ontario |
| Valdi | 4 | | Steinberg's, Toronto, Ontario |
| LEADING CONVENIENCE STORE CHAINS: | | 7.2% | |
| Mac's Milk | 16 | 7.2 | Lumsden Wholesalers, Hamilton, Ontario |
| Little Short Stop | 28 | | National Grocers, Kitchener, Ontario |
| Becker's Milk | 13 | | National Grocers, Kitchener, Ontario |
| 7-Eleven | 3 | | National Grocers, Kitchener, Ontario |
| Kwikie Minit Markets | 15 | | National Grocers, Kitchener, Ontario |
| Min-A-Mart | 3 | | National Grocers, Kitchener, Ontario |
| Dutch Girl Shopettes | 4 | | Oshawa Group, Oshawa, Ontario |
| LEADING INDEPENDENTS: | | 11.3% | |
| Knechtel's | 3 | 11.3 | (Own) Kitchener, Ontario |
| Forest Hill Village Market | 1 | | Knechtel's, Kitchener, Ontario |
| Central Meat Market | 1 | | (Own) Kitchener, Ontario |
| Hiway Market | 1 | | Willet Food Ltd., Kitchener, Ontario |
| OTHER GROCERY STORES | 25 | 2.4% | |
| TOTAL | 144 | 100.0% | |

## MONTREAL

Market Area Covered:
Metropolitan Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 50.8% | |
| Steinberg | 89 | 30.1 | (Own) Montreal, P.Q. |
| Dominion | 71 | 15.4 | (Own) Montreal, P.Q. |
| A&P | 12 | 2.1 | (Own) Montreal, P.Q. |
| Hypermarche | 3 | 1.5 | Hudon et Deaudelin |
| AVA | 5 | 0.9 | Provigo (Montreal) |
| Vincent | 7 | 0.8 | (Own) Montreal, P.Q. |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 27.2% | |
| Metro | 145 | 8.6 | Metro-Richelieu Inc., Montreal, P.Q. |
| IGA-Boniprix | 83 | 5.1 | Hudon et Deaudelin, Montreal, P.Q. |
| Provigain | 40 | 4.1 | Provigo (Montreal) Inc., Montreal, P.Q. |
| Richelieu-Select | 70 | 3.3 | Metro-Richelieu Inc., Montreal, P.Q. |
| Provibec | 50 | 1.9 | Provigo (Montreal) Inc., Montreal, P.Q. |
| Champion | 140 | 1.7 | Provigo (Montreal) Inc., Montreal, P.Q. |
| L'Equipe | 47 | 1.1 | Hudon et Deaudelin, Montreal, P.Q. |
| H.H. | 45 | 0.8 | H. Hardwood Ltee., Montreal, P.Q. |
| Provipop | 40 | 0.7 | Provigo (Montreal) Inc., Montreal, P.Q. |
| Lucerne | 6 | 0.4 | Legault & Masse Ltee., Montreal, P.Q. |
| LEADING INDEPENDENTS: | | 0.9% | |
| Cooprix | 3 | 0.6 | Federation des Magasins Co-op, Quebec City |
| Warsaw | 2 | 0.3 | (Own) Montreal |
| OTHER GROCERY STORES | 992+ | 20.6% | |
| TOTAL | 1,850 | 100.0% | |

## OTTAWA

Market Area Covered:
Census Metropolitan Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 67.0% | |
| Loblaw | 14 | 30.0 | National Grocers, Ottawa |
| Dominion | 10 | 20.0 | (Own) Montreal |
| Steinberg | 12 | 15.0 | (Own) Toronto |
| A&P | 3 | 2.0 | (Own) Toronto |
| LEADING CONVENIENCE STORE CHAINS: | | 8.0% | |
| Mac's Milk | 50 | 4.0 | Silverwood Industries |
| Pinto | 33 | 3.0 | M. Loeb, Ottawa |
| Beckers | 25 | 1.0 | National Grocers, Ottawa |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 20.0% | |
| IGA | 32 | 20.0 | M. Loeb, Ottawa |
| LEADING INDEPENDENTS: | | 1.5% | |
| Provibec | 6 | 0.5 | Provigo, Ottawa |
| Much More | 5 | 0.4 | M. Loeb, Ottawa |
| Red & White | 3 | 0.3 | National Grocers, Ottawa |
| Provipop | 4 | 0.3 | Provigo, Ottawa |
| OTHER GROCERY STORES | 190+ | 3.5% | |
| TOTAL | 377+ | 100.0% | |

## TORONTO

Market Area Covered:
Metropolitan Statistical Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 79.1% | |
| Dominion | 129 | 31.5 | (Own) Toronto |
| Loblaw | 80 | 15.5 | (Own) Toronto |
| Miracle Mart | 35 | 12.5 | Steinberg's Limited, Toronto |
| Food City (Oshawa) | 12 | 6.2 | Oshawa Group, Toronto |
| A&P | 40 | 4.5 | (Own) Toronto |
| Knob Hill Farms | 5 | 4.0 | (Own) Toronto |
| Safeway | 12 | 2.5 | (Own) Toronto |
| Darrigo Supermarkets | 5 | 1.2 | (Own) Toronto |
| Darrigo Food Markets | 9 | 1.2 | (Own) Toronto |
| LEADING CONVENIENCE STORES: | | 5.9% | |
| Becker's | 269 | 3.5 | National Grocers Co. |
| Mac's Milk | 150 | 1.7 | (Own) Toronto |
| Your Pantry | 9 | 0.1 | na |
| Sunnybrook | 5 | 0.6 | (Own) Toronto |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | 4.0% | |
| IGA | 52 | 3.2 | Oshawa Group, Toronto |
| Red & White | 16 | 0.8 | National Grocers Co. |
| LEADING INDEPENDENTS: | | 1.8% | |
| Bittner's | 16 | 0.7 | Dominion Stores, Toronto |
| Ziggy's | 16 | 0.6 | Loblaws Limited, Toronto |
| Dixie Market | 1 | 0.3 | na |
| Discount Food | 1 | 0.1 | Dominion Stores, Toronto |
| Super Save | 1 | 0.1 | National Grocers Co. |
| OTHER GROCERY STORES | 774+ | 9.2% | |
| TOTAL | 1,637+ | 100.0% | |

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na - not available

## VANCOUVER

Market Area Covered:
Census Metropolitan Area

| | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | | |
| Safeway | 49 | na | (Own) Vancouver, B.C. |
| Shop Easy | 30 | na | Kelly Douglas, Vancouver, B.C. |
| Overwaitea | 8 | na | (Own) Vancouver, B.C. |
| Lucky Dollar | 6 | na | Kelly Douglas, Vancouver, B.C. |
| Woodwards Food Stores | 7 | na | na |
| Econo-Mart | 2 | na | Kelly Doublas, Vancouver, B.C. |
| LEADING CONVENIENCE STORE CHAINS: | | | |
| Mac's | 49 | na | na |
| 7-Eleven | 17 | na | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Affiliated Accounts | 29 | na | na |
| Asso. Merchants of B.C. | 94 | na | Kelly Douglas, Vancouver, B.C. |
| Super Valu | 35 | na | Kelly Douglas, Vancouver, B.C. |
| IGA | 27 | na | H.Y. Louie, Vancouver, B.C. |
| Red & White | 12 | na | Kelly Douglas, Vancouver, B.C. |
| Federated Co-op | 7 | na | (Own) Vancouver, B.C. |
| Stongs | 5 | na | na |
| TOTAL | 377+ | | |

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na - not available

## VICTORIA

| Market Area Covered:<br>Census Metropolitan Area | No. of Stores | % of Market's Grocery Store Sales | Principal Supplier |
|---|---|---|---|
| LEADING CHAINS: | | 69.0% | |
| Safeway | 10 | 40.0 | (Own) |
| Woodwards | 1 | 11.0 | (Own) Vancouver, B.C. |
| Warehouse Food Stores | 4 | 9.0 | na |
| Shop-Easy Stores | 6 | 9.0 | Kelly Douglas |
| LEADING CONVENIENCE STORE CHAINS: | | 0.5% | |
| Mac's | 4 | 0.5 | na |
| VOLUNTARY &/OR COOPERATIVE GROUPS: | | | |
| Associated Merchants, Ltd. | na | na | Victoria, B.C. |
| Salde & Stewart Ltd. | na | na | Victoria, B.C. |
| LEADING INDEPENDENTS: | | 23.0% | |
| Fairway | 1 | 8.0 | na |
| Economart | 1 | 4.0 | na |
| Low Cost | 16 | 4.0 | na |
| Capital Foods | 2 | 3.0 | na |
| Saanick Peninsula Co-op | 1 | 2.0 | na |
| Wellburns | 1 | 2.0 | na |
| OTHER GROCERY STORES | 165 | 7.5% | |
| TOTAL | 212 | 100.0% | |

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na - not available

# SECTION 3

## PROFILES OF LEADING FOOD CHAINS

# 1984 STATISTICS FOR LEADING FOOD CHAINS

| Company | Sales (000's) 1984 | Sales (000's) 1983 | % Chg. | Net Income (000's) 1984 | Net Income (000's) 1983 | % Chg. | % Net Income to Sales 1984 | % Net Income to Sales 1983 | Pre-Tax Income (000's) 1984 | Pre-Tax Income (000's) 1983 | Shareholders' Equity (000's) 1984 | Shareholders' Equity (000's) 1983 | % Net Income to Shareholders' Equity 1984 | % Net Income to Shareholders' Equity 1983 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Safeway Stores | $19,642,201 | $18,585,217 | + 5.69 | $185,011 | $183,303 | + 0.93 | 0.94 | 0.99 | $298,822 | $300,933 | $1,469,023 | $1,390,354 | 12.59 | 13.18 |
| Kroger Co. | 15,922,891 | 15,236,013 | + 4.51 | 156,633 | 127,079 | +23.26 | 0.98 | 0.83 | 265,363 | 211,969 | 1,148,776 | 1,072,852 | 13.63 | 11.84 |
| Lucky Stores | 9,236,529 | 8,388,155 | +10.11 | 94,631 | 105,400 | -10.22 | 1.02 | 1.26 | 173,417 | 193,017 | 609,442 | 573,619 | 15.53 | 18.37 |
| George Weston(A) | 8,254,700 | 7,799,600 | + 5.83 | 93,500 | 79,200 | +18.06 | 1.13 | 1.02 | 173,700 | 164,100 | 754,500 | 686,300 | 12.39 | 11.54 |
| American Stores | 7,983,677 | 7,507,772 | + 6.34 | 117,902 | 90,371 | +30.46 | 1.48 | 1.20 | 216,129 | 166,859 | 451,694 | 357,455 | 26.10 | 25.28 |
| Winn-Dixie | 7,302,369 | 7,018,605 | + 4.04 | 115,916 | 113,460 | + 2.16 | 1.59 | 1.62 | 188,192 | 189,492 | 608,673 | 582,823 | 19.04 | 19.47 |
| Super Valu (B) | 6,547,680 | 5,727,565 | +14.32 | 107,212 | 76,732 | +39.72 | 1.64 | 1.34 | 157,530 | 132,573 | 469,170 | 384,671 | 22.85 | 19.95 |
| Loblaw Cos. (C) | 6,419,400 | 6,091,019 | + 5.39 | 64,200 | 52,747 | +21.71 | 1.00 | 0.87 | 108,500 | 102,011 | 466,200 | 413,258 | 13.77 | 12.76 |
| Great A & P (D) | 5,222,013 | 4,607,817 | +13.33 | 47,551 | 31,211 | +52.35 | 0.91 | 0.68 | 63,951 | 45,061 | 375,789 | 329,372 | 12.65 | 9.48 |
| Albertson's | 4,735,724 | 4,279,331 | +10.67 | 79,746 | 70,281 | +13.47 | 1.68 | 1.64 | 147,462 | 127,362 | 454,419 | 391,847 | 17.55 | 17.94 |
| Supermarkets General | 4,346,680 | 3,517,548 | +23.57 | 52,424 | 40,674 | +28.89 | 1.21 | 1.16 | 98,205 | 73,708 | 287,410 | 241,595 | 18.24 | 16.84 |
| Steinberg's (E) | 3,452,275 | 3,357,942 | + 2.81 | 15,021 | 13,392 | +12.16 | 0.44 | 0.40 | 30,081 | 2,599 | 417,958 | 393,738 | 3.59 | 3.40 |
| Stop & Shop+ (F) | 3,247,298 | 2,790,799 | +16.36 | 54,845 | 50,801 | + 7.96 | 1.69 | 1.82 | 100,351 | 88,381 | 388,830 | 284,611 | 14.11 | 17.85 |
| Oshawa Group | 2,665,774 | 2,434,985 | + 9.48 | 36,179 | 25,895 | +39.71 | 1.36 | 1.06 | 63,599 | 45,538 | 226,084 | 195,223 | 16.00 | 13.26 |
| Giant Food | 2,138,789 | 1,957,435 | + 9.26 | 45,221 | 40,511 | +11.63 | 2.11 | 2.07 | 82,428 | 73,246 | 228,728 | 193,383 | 19.77 | 20.95 |
| Waldbaum's | 1,711,923 | 1,586,895 | + 7.88 | 13,028 | 13,940 | 6.54 | 0.76 | 0.88 | 23,348 | 24,210 | 128,432 | 115,411 | 10.14 | 12.08 |
| Argcen Holdings (G) | 1,572,854 | 2,204,972 | - 28.67 | (6,159) | 31,604 |  |  | 1.43 | (49,820) | 22,821 | 437,564 | 453,132 | – | 6.97 |
| First Nat'l. Supermkts. | 1,276,976 | 1,267,563 | + 0.74 | (10,806) | 8,078 |  | – | 0.64 | (10,806) | 11,678 | 46,097 | 47,165 | – | 17.13 |
| Nash Finch | 1,238,319 | 1,142,988 | + 8.34 | 11,686 | 11,067 | + 5.59 | 0.94 | 0.97 | 21,169 | 19,705 | 100,094 | 93,404 | 11.68 | 11.85 |
| Cullum Cos. | 1,228,240 | 1,126,638 | + 9.02 | 12,577 | 13,854 | 9.22 | 1.02 | 1.23 | 21,322 | 23,248 | 93,751 | 85,665 | 13.42 | 16.17 |
| Borman's | 1,025,920 | 996,236 | + 2.98 | (1,119) | (10,915) |  | – | – | (1,119) | (10,915) | 22,797 | 23,901 | – | – |
| Weis Markets | 957,775 | 891,857 | + 7.39 | 55,307 | 50,120 | +10.35 | 5.77 | 5.62 | 104,612 | 95,742 | 323,509 | 283,967 | 17.10 | 17.65 |
| Pacific Gamble Robinson | 842,075 | 833,199 | + 1.07 | 1,393 | 3,121 | -55.37 | 0.17 | 0.37 | 2,125 | 4,619 | 53,831 | 55,071 | 2.59 | 5.67 |
| Marsh Supermarkets | 628,146 | 604,953 | + 3.83 | 4,716 | 1,625 | +190.22 | 0.75 | 0.27 | 6,365 | 1,447 | 47,537 | 44,338 | 9.92 | 3.67 |
| Shopwell (H) | 557,157 | 511,936 | + 8.83 | (1,548) | 1,799 |  | – | 0.35 | 592 | 1,783 | 29,864 | 31,600 | – | 5.69 |
| Allied Supermarkets (I) | 529,793 | 575,749 | - 7.98 | (2,566) | 14,814 |  | – | – | (2,566) | 5,662 | 52,026 | 56,083 | – | – |
| Pueblo Intl. (J) | 518,335 | 476,806 | + 8.71 | 5,105 | 3,882 | +31.50 | 0.98 | 0.81 | 5,578 | 7,151 | 47,447 | 42,840 | 10.76 | 9.06 |
| Fisher Foods (K) | 503,477 | 506,420 | - 0.58 | (5,464) | 509 |  | – | 0.10 | (5,744) | (2,443) | 70,558 | 76,115 | – | 0.67 |
| Foodrama | 450,748 | 439,971 | + 2.45 | 210 | 155 | +35.48 | 0.05 | 0.04 | 335 | 125 | 22,288 | 22,080 | 0.94 | 0.70 |

NOTE: The criterion for inclusion in this list is that the sales of each chain be at least $400,000,000. In some instances comparative figures for 1983 have been restated for various reasons.

( ) Designates a loss.

NA Not Available.

+ 53 Weeks in 1984, 52 weeks in 1983.

* 52 Weeks in 1984, 53 weeks in 1983.

(A) Net income of George Weston includes extraordinary gains of $4,700,000 in 1984 and $600,000 in 1983.

(B) Net income of Super Valu includes discontinued operations in both years.

(C) Net income of Loblaw Cos. includes extraordinary gains of $3,100,000 in 1984 and $700,000 in 1983.

(D) Net income of Great A & P includes extraordinary gains of $16,150,000 in 1984 and $9,850,000 in 1983.

(E) Net income of Steinberg's includes an extraordinary gain of $1,313,000 in 1983.

(F) Stop & Shop's supermarket segment sales are $1,657,563,000 in 1984 and $1,425,251,000 in 1983.

(G) Net income of Argcen Holdings includes an extraordinary gain of $5,422,000 in 1984.

(H) Net income of Shopwell includes discontinued operations in 1984.

(I) Net income of Allied Supermarkets includes an extraordinary gain of $11,729,000 in 1983.

(J) Net income of Pueblo Int'l. includes extraordinary gains of $1,416,000 in 1984 and $733,000 in 1983.

(K) Net income of Fisher Foods includes an extraordinary gain of $201,000 in 1983.

## ALBERTSON'S, INC.

P.O. Box 20
250 Parkcenter Boulevard
Boise, Idaho 83726

OFFICERS: J.A. Albertson, chairman of the exec. committee; Warren E. McCain, chairman of the board & chief exec. officer; John B.Carley, president; Robert D. Bolinder, vice chairman; Kenneth R. Huff, exec. v.p.-retail support systems; John H. Sheehan, v.p.-retail operations; Gary G. Michael, vice-chairman & chief financial & corporate development officer; C. Clint Joyce, sr. v.p.-management information systems; Alec R. Gloth, sr. v.p.-store planning; Michael F. Reuling, sr. v.p.-real estate; Gerald R. Rudd, sr. v.p.-human resources; Wendell E. Hornecker, sr. v.p.-design & construction; Thomas R. Sadin, sr. v.p. & general counsel; W. L. Jordan, sr. v.p.-corp. merchandising; vice presidents: Pamela J. Beaumont-marketing; Robert C. Braun-distribution; David I. Connolly-treasurer; Harvey S. Durand-drug sales; Dennis R. Graves, v.p.-general merchandise sales; Peter W. Gustavsen-distribution; James L. Jackson-dairy operations; Alfred A. Kasner-grocery sales; Kenneth R. Kramer-service delicatessen sales; Lee F. Levy-private label operations; Leland M. Pollock-meat sales; M. Jed Pritchett, Jr.-industrial relations; Richard C. Rowe-produce & liquor sales; Patrick S. Steele-systems; Steven D. Young-personnel; Burnell K. Semrau-employee development; Jerry R. Timm-controller; Robert R. Wilt-meat operations; Minnie O. Armstrong-secretary; Ada A. Connor, Carol L. Wood, asst. secretaries.

DIRECTORS: J.A. Albertson, Kathryn Albertson, R.V. Hansberger, B.Z. Kastler, Warren E. McCain, John B. Fery, Charles D. Lein, John B. Carley, W.H. McMurren, Gary G. Michael, David Little, James E. Bruce, Cecil D. Andrus.

BUSINESS ACTIVITIES: Operates a chain of food centers in Idaho, California, Montana, Nevada, Oregon, Utah, Washington, Nebraska, Wyoming, Colorado, Arizona and New Mexico. Operates a chain of supermarkets in 17 western and southern states, broken down into 272 conventional supermarkets, 45 superstores, 85 combination food-drug units, and 14 special supermarkets called "The Grocery Warehouse."

NUMBER OF STORES: 434

RETAIL SALES (1985): $4,735,724,000

## ALLIED SUPERMARKETS, INC.

8711 Meadowdale
Detroit, Michigan 48228
(313) 943-3300

OFFICERS: Lon D. Makanoff, president & chief operating officer; David K. Page, chairman of the board & chief executive officer; Elmer L. Bratz, senior v.p.-wholesale operations; Jerry M. Otis, v.p. & general manager-Humpty Ideal Supermarkets Division; Donald R. Gapp, v.p. & controller; John W. Masek, v.p.-industrial relations; Joseph Mocnik, v.p. & gen. Mgr.-Great Scott Super Markets and Family Drug Divisions; Dennis M. Sidelaczek, v.p. & gen. mgr.-Abner A. Wolf Company; Stephen J. Zula, v.p.-real estate; Lloyd Silverman, treasurer; Larry D. Hunter, corporate secretary.

DIRECTORS: David K. Page, chairman; Martin E. Citrin, Sidney Lapidus, Barbara B. Murray, David K. Page, D.J. Rixmann, Earl W. Smith.

BUSINESS ACTIVITIES: Allied operated 49 Great Scott Supermarkets in Michigan, 44 supermarkets in Oklahoma, Kansas and Texas under the names Humpty Supermarkets and Ideal Supermarkets, and one Kmart Food Store in South Dakota. It also operates a wholesale division, the Abner Wolf Company, which serves independent grocery stores in Michigan and Ohio and operates eight Cash & Carry Wholesale outlets. In addition, Allied operates six Family Drug Stores in Michigan, 26 in-store drug units in Oklahoma and Texas and one free-standing drug store in Oklahoma.

NUMBER OF STORES: 96*

*Includes drug units, most of which are located in Allied Supermarkets.

RETAIL SALES (1984**): $529,793,000

**53 weeks

## AMERICAN STORES COMPANY

P.O. Box 27447
709 East South Temple
Salt Lake City, Utah 84127
(801) 529-0112

OFFICERS: L.S. Skaggs, chairman of the board; Thomas W. Field, Jr., president, Richmond G. Dunlop, vice chairman & treasurer; Thomas H. Sunday, exec. v.p., general counsel & secretary; Scott Bergeson, exec. v.p. & asst. secretary; Robert L. Salmon, v.p.; Vicor L. Lund, sr. v.p. & controller; Michael T. Miller, sr. v.p. & asst. secretary; Gerald T. Glancey, v.p. & asst. treasurer; Frederick P. McBrier, asst. secretary; Hugh M. Zumbro, v.p.; Dennis N. Beal, asst. controller; Lynn Huizenga, asst. v.p.

DIRECTORS: William R. Deeley, Thomas W. Field, Jr.*, Thomas W. King, Williford Gragg, Leon G. Harmon, L. Tom Perry, Earl P. Staten, L.S. Skaggs*, Aline W. Skaggs, Richard G. Dunlop, Thomas H. Sunday*, I.J. Wagner.

* Member of Executive Committee.

BUSINESS ACTIVITIES: Operates self-service supermarkets under the names of Acme and Super Saver in New York, Pennsylvania, New Jersey, Delaware, Maryland, Virginia, and West Virginia. Subsidiaries also manufacture and process food for sale in these supermarkets and Alpha Beta Stores the company operates in California, and Arizona. Also operates Rea and Derick Drug Stores in Pennsylvania, New York, and Maryland. Operates Skaggs' Drug Centers, 190 drug stores and 70 combination drug/grocery stores in 20 states in the Southwest, West, and Midwest.

NUMBER OF STORES: 629

RETAIL SALES (1984): $7,983,677,000

## ARGCEN HOLDINGS INC.

10 Toronto Street
Toronto, Canada M5C 2B7

OFFICERS: Conrad M. Black, chairman of the board; G. Montegu Black, president and chief executive officer; Dixon S. Chant, John R. Finlay, Q.C., vice presidents; Wendell F. White, C.A. treasurer; Charles G. Cowan, Q.C., secretary.

DIRECTORS: Lewis H.M. Ayre, Ralph M. Barford, Conrad M. Black, G. Montegu Black, Dixon S. Chant, Glen W. Davis, John R. Finley, Q.C., Hon. Clarence L. Gosse, Hon. W. John McKeag, Andre Monast, Q.C., Beryl A. Plumptre, F. David Radler, Ronald T. Riley, Trumbull Warren.

BUSINESS ACTIVITIES: Argcen Holdings Inc. is a holding company with significant interests, through subsidiary and associated companies, in natural resources, communications, wholesaling and retailing. The wholesaling and retailing group is primarily involved in the manufacturing, distribution and retailing of food for home consumption. The natural resources group is engaged in the exploration for and production of oil and natural gas in Canada, the United States and Australia, and participates in major iron ore operations in Labrador. The communications group carries on the business of radio and television and related services.

NUMBER OF STORES: 66

RETAIL SALES (1984): $1,572,854

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## BORMAN'S, INC.

18718 Borman Avenue
Detroit, Michigan 48228
(313) 835-9500

Mailing address:
P.O. Box 446
Detroit, Michigan 48232

OFFICERS: Paul Borman, president; Thomas V. Angott, exec. v.p.; Daniel J. Church, v.p.-finance & treasurer; Leonard Borman, secretary; James R. Smith, v.p.-personnel; Ray Rohr, controller, Ted J. Simon, v.p.-real estate.

DIRECTORS: Paul Borman, Sylvan Rapaport, Thomas V. Angott, Daniel J. Church, Leonard Borman, E.L. Koning, Grant C. Gentry, Ted J. Simon, Jack Levine.

BUSINESS ACTIVITIES: Operates Farmer Jack supermarkets located in Detroit and environs; Food Fair, Mini-Mart convenience stores; also owns the Detroit Pure, a milk company, and the Wesley's Quaker Maid ice cream company.

NUMBER OF STORES: 85

RETAIL SALES (1985): $1,025,920,000

## CULLUM COMPANIES. INC.

14303 Inwood Road
Dallas, Texas 75234
(214) 661-9700

OFFICERS: Charles G. Cullum, chairman of the board and chief executive officer; Jack W. Evans, president & chief operating officer; J.T. Hairston, Jr., exec. v.p.; James E. Stiles, controller; Robert B. Cullum, Jr., v.p. corporate development; Houston E. Holmes, Jr., v.p., secretary & general counsel; J. Harold Berg, asst. secretary.

DIRECTORS: John S. Burns, Charles G. Cullum*, J. Harold Berg*, Jack W. Evans*, Earl A. Forsythe, W.R. Hawn, Mrs. Paul Middleton, Houston E. Holmes, Jr.*, J.T. Hairston, Jr.*, Mrs. Robert B. Cullum, Norman Brinker, Robert Onstead.

BUSINESS ACTIVITIES: Operates a chain of supermarkets and drug stores in Texas and California; the Tom Thumb Supermarkets and Page Drug Stores operate in the Austin and Dallas, Texas area and Pantry Food Markets are located in the greater Los Angeles area; operates Hinky-Dinky Supermarkets in Nebraska, South Dakota and Iowa and Grocery Supply Company stores in Nebraska, Kansas, Iowa, Arkansas, Oklahoma and Missouri. Also operates wholesale food distributing companies and a meat packing firm.

NUMBER OF STORES: 122

RETAIL SALES (1984): $1,228,240,000

## FIRST NATIONAL SUPERMARKETS

17000 Rockside Road
Maple Heights, Ohio 44137
(216) 587-7100

OFFICERS: Richard J. Bogomolny, chairman of the board & chief executive officer; Robert T. Samuels, president and chief operating officer; M. Michael Charnas, sr. v.p., chief financial & administrative officer; Frank McDonald, v.p.-labor management affairs; John A. Shields, sr. v.p. & president-Pick-N-Pay and Edward of Ohio; Thomas G. Steinberg, sr. v/p. & president-Finast and Edwards East; Robert W. Sullivan, v.p.-general counsel & secretary; Donald A. DeSantis, v.p. & controller; George F. McPhillips, v.p.-real estate; Philip Doherty, v.p. & treasurer.

DIRECTORS: Richard J. Bogomolny, chairman; Milton Kravitz, Martin M.Lewis, Maurice Saltzman, Allan K. Shaw, Henry Weigi, Robert L. Bogomolny, Robert T. Samuels.

BUSINESS ACTIVITIES: Operates a chain of food stores known as Pick-N-Pay, Finast, and Edwards in Ohio, Maine, New Hampshire, Vermont, Massachusetts, Connecticut and New York.

NUMBER OF STORES (1984): 148

RETAIL SALES (1984*): $1,276,976,000

* 53 weeks

## FISHER FOODS, INC.

5300 Richmond Road
Bedford Heights, Ohio 44146
(216) 292-7000

Mailing address:

P.O. Box 46555
Cleveland, Ohio 44146

OFFICERS: Carl H. Lindner, chairman of the board and chief exec. officer; Robert L. Hayden, president & chief operating officer; Robert R. Gerber, sr. v.p. & chief financial officer; Gregory Mays, controller; James E. Evans, v.p. & secretary.

DIRECTORS: Wendell Earle, Carl Fazio, Robert L. Hayden, James O. Henley, James E. Evans, Carl H. Lindner, Robert C. Lintz, Ronald F. Walker.

BUSINESS ACTIVITIES: The company is a food wholesaler under the "Heritage Wholesalers" name and a retailer operating 47 supermarkets under the "Fazio's" name in the Cleveland metropolitan area. The company also operates Omar Bakeries Inc., Eagle Ice Cream, Prestige Donuts and Feren Fruit Basket Company.

NUMBER OF STORES: 49

RETAIL SALES (1984): $503,477,000

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## FOODARAMA SUPERMARKETS, INC.

303 West Main Street
Box 592
Freehold, New Jersey 07728
(201) 462-4700

OFFICERS: Joseph J. Saker, chairman of the board & president; Sidney Cohen, sr. v.p.-administration, real estate & corporate planning, & asst. secretary; Robert V. Condon, v.p.-sales & merchandising; Richard Saker, sr. v.p.-operations; John J. McAteer, sr. v.p.-personnel & labor relations; Joseph C. Troilo, sr. v.p.-finance; Mary Saker, secretary & treasurer.

DIORECTORS: Joseph J. Saker*, chairman; Arthur M. Borden, Sidney Cohen*, John W. Hurley, Mary Saker*, Harold A. Stoller.

* Member of the Executive Committee.

BUSINESS ACTIVITES: Operates Foodarama Supermarkets, under the Shop-Rite name, in New York, New Jersey, Connecticut and Pennsylvania. Also operates one liquor store, two garden centers, and in-store pharmacies.

NUMBER OF STORES: 28

RETAIL SALES (1984*): $450,748,000

* 53 weeks

## GEORGE WESTON LIMITED

22 St. Clair Avenue East
Suite 1901
Toronto, Ontario, Canada N4T 2S7
(416) 922-2500

OFFICERS: W. Galen Weston, chairman of the board & president; Richard J. Currie, sr. v.p.; Mark Hoffman, managing director-Guinness Peat Group; Robert H. Kidd, sr. v.p. & chief financial officer; David A. Nichol, sr. v.p.; Earl R. Pearce, sr. v.p.-resource group; William A. Sloan, v.p.-finance; Ralph S. Barnes, v.p. & treasurer; Ivan R. Franklin, v.p.; Stewart E. Green, v.p. & general counsel; Terrence H. Wardrop, v.p. & controller; G. Ross Lawford, gen. mgr.-Weston Reseach Center; Douglas E. Perrin, v.p.-finance, Food Processing Group.

DIRECTORS: W. Galen Weston, chairman; John C. Scarth, John D. Stevenson, Richard J. Currie, David A. Nichol, Mark Hoffman, S. Simon Reisman, Hugo Mann, Pauline McGibbon, Garry H. Weston, Robert H. Kidd.

BUSINESS ACTIVITIES: Diversified operations in food processing, fisheries, forest products, and wholesale-retail food distribution.

DIVISIONS AND SUSSIDIARIES:

Wholesale and Retail

Canadian operations include wholesale and retail marketing of food and other products throughout Canada, catering and restaurant servicing in Western Canada, food manufacturing for distribution in Canada and the United States. Also engaged in wholesale and retail distribution of food and other products in central United States and California. The Company owns warehouses in strategic centers with 292 supermarkets across Canada and 214 in the northeastern and south central United States. Also operates food manufacturing plants in Burnaby, British Columbia. United States facilities include supermarkets located primarily in the central United States with warehouses in major centers.

Canadian Operations

Loblaw Companies Limited (78% owned)
Atlantic Wholesalers Division
National Grocers Company, Limited
Zehrmart Limited
Kelly, Douglas & Company, Limited (73% owned)
National Tea
Loblaw, Ontario

United States Operations

National Tea Co. (73% owned)
Peter J. Schmitt Co., Inc.

NUMBER OF STORES: 510

RETAIL SALES (1984): $8,254,700

## GIANT FOOD INC.

6300 Sheriff Road
Landover, Maryland 20785
(301) 341-4100

Mailing Address:
Box 1804
Washington, D.C. 20013

OFFICERS: Israel Cohen, chairman of the board, president & chief exec. officer; David B. Sykes, sr. v.p.-finance & secretary; Gerson Barnett, sr. v.p.-grocery operations; Alvin Dobbin Sr., v.p.-operations; David Freedman, v.p.-corporate facilities; v.p. & treasurer; David W. Rutstein, sr. v.p. & counsel; sr. v.p.-professional services; Donald R. Buchanan, sr. v.p.-data processing; Jeremiah E. Donovan, v.p.-personnel; Albert J. Lechert, Jr., v.p.-construction operations; Joseph J. Jacobe, v.p.-Pants Corral; Clifford R. Logan, v.p.-corp. planning; Peter L. Manos, sr. v.p.-perishable operations; Terry A. Gans, v.p.-advertising & sales promotion; Odonna Mathews, v.p.-consumer affairs; Roger D. Olson, v.p.-labor relations; Alan Swoff, v.p.-frozen food operations; David Larson, v.p.-manufacturing; George W. Hannis, Jr., v.p.-dairy, delicatessen; M. Davis Herriman, v.p.-grocery operations; Emmanuel Richman, v.p.-pharmacy operations; Robert W. Schoening, v.p.-data processing systems; Samuel F. Thurston, v.p.-distribution; Albert Reinach, controller; Arthur Koch, asst. secretary.

DIRECTORS: David B. Sykes, Mrs. Jac Lehrman, Israel Cohen, Millard F. West, Jr., Morton H. Wilner, Richard Waxenberg, O. Roy Chalk.

BUSINESS ACTIVITIES: Operates a chain of Giant Food supermarkets in Washington, D.C., Maryland and Virginia. Also operates food-pharmacy units; Pants Corrals specialty shops featuring slacks, jeans, and accessories.

NUMBER OF STORES: 131

RETAIL SALES (1985): $2,138,789,000

## THE GREAT ATLANTIC & PACIFIC TEA COMPANY, INC.

(50.3% owned by Tengelmann Warenhandels-Gesellschaft)

Box 418
2 Paragon Drive
Montvale, New Jersey 07645
(201) 573-9700

OFFICERS: James Wood, chairman of the board & chief exec. officer; P. Louis Sherwood, president; James W. Rowe, vice chairman, chief admin. officer & asst. to the chief exec. officer; Eckart C. Siess, vice chairman-international operations; Alan C. Goulding, sr. exec. v.p., president & chief operating officer-U.S. A&P store operations; John J. Miles, sr. exec. v.p., chairman & president-Family Centers, Inc.; Thomas L. Barrete, v.p.-human resources, communications & public affairs; Vito A. Cardace, sr. v.p. & chief financial officer; Joseph A. McCarthy, exec. v.p.-U.S. A&P store operations; Peter O'Gorman, sr. v.p.-development; Ivan K. Szathmary, sr. v.p.-information & administration systems; Robert G. Ulrich, sr. v.p. & general counsel: Randall A. Bostwick, v.p. & president-Super Market Service Corporation; James B. Burmeister, v.p.-Carolina Group, Timothy J. Courtney, v.p.-taxation, William W. Jackson, v.p.-Southeastern Group, H. Nelson Lewis, v.p.-retail operations services; James L. Madden, v.p.-Mid-Atlantic Group; James L. Madden, v.p.-Mid-Atlantic; Peter Brooker, v.p. & secretary; George K. Raven, treasurer; Michael J. Rourke, v.p.-marketing; Donald B. Dobson, v.p.-Southern Group, Burton J. Weinbaum, v.p.-Northeast Group; Carlyle Sherwin, president-A&P Michigan, William G. Spearman, president-Kohl's Food Stores: Martin H. Kern, exec. v.p.-merchandising/purchasing & distribution; Edward C. Mossop, sr. v.p. & chairman-A&P Canada; Thomas L. Barrete, v.p.-human resources; O.C. Cook, v.p.-meat merchandising; Jack DiFiore, v.p. and president-Super Fresh Markets; Compass Foods, Peter R. Lavoy, v.p.- grocery mdsg. and purchasing; Frank Leonard, v.p.-real estate & A&P properties; Joseph Quirk, v.p.-industrial relations; John D. Ryder, v.p.-marketing; Richard J. Scola, asst. secretary & asst. gen. counsel; Robert W. Toomey, v.p.-warehouse distribution; John Sherrard, v.p.-Richmond Group; J. Paul Stillwell, v.p.-Metro New York Group.; Paul Gallant, v.p.-Compass Foods.

DIRECTORS: James Wood, chairman; Harold J. Berry, Walter D. Dance, Rosemarie Baumeister, Eckart C. Siess, Helga Haub, Christopher F. Edley, James W. Rowe, Paul C. Nagel, Jr., Barbara Barnes Hauptfuhrer, Fritz Teelan, Henry W. Van Baalen.

BUSINESS ACTIVITIES: Operates a chain of supermarkets under the A&P, PLUS and Family Mart names in the United States and Canada.

NUMBER OF STORES: 1,001

RETAIL SALES (1984): $5,222,013,000

## THE KROGER CO.

1014 Vine Street
Cincinatti, Ohio 45201
(513) 762-4000

OFFICERS: Lyle Everingham, president, chairman of the board & chief exec. officer; William G. Kagler, president; Richard M. Koster, Charles L. Thomas, sr. v.p.'s; George A. Leonard, v.p., secretary & general counsel; Gerald L. Wolken, v.p. & president-Super Rx Drug Stores; Lawrence Turner, treasurer; Jack G. Hudson, v.p. & controller; Robert E. Saffron, v.p.; Arthur Juergens, William J. Sinkula, John L. Strubbe, Walter Dryden, George L. Irwin, David A. Burt, group v.p.'s; Ray E. Dillon, Jr., chairman-Dillon Companies, Inc.; Richard W. Dillon, vice chairman-Dillon Companies; Inc.; Joseph A. Pichler, president-Dillon Companies, Inc.

DIRECTORS: Jackson C. Hinds*, Philip E. Beekman, Lyle Everingham, T. Ballard Morton, Jr*, W. George Pinnell, Jr., Ray E. Dillon, Jr., Richard W. Dillon, William G. Kagler*, Joseph A. Pichler, William A. Atteberry, Russell L. Wagner, John D. Ong, Patricia Shontz Longe, Thomas H. O'Leary, Raymond B. Carey, Jr., Otis M. Smith.

BUSINESS ACTIVITIES: Operates a chain of retail supermarkets and drug stores; also conducts food processing operations. Supermarkets are located in 21 states, primarily in the Midwest and South, drug stores are located in 21 states.

*Members of the Executive Committee.

NUMBER OF STORES: 1,318

RETAIL SALES (1984): $15,922,891,000

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## LOBLAW COMPANIES LIMITED

22 St. Clair Avenue East
Toronto, Ontario, Canada M4T 2S3
(416) 922-2500

OFFICERS: W. Galen Weston, chairman of the board; Richard J. Currie, president; Raymond J. Addington, David A. Nichols, David M. Williams, exec. v.p.'s; Brian Y. Davidson, sr. v.p.-business development; Harold A. Seitz, sr. v.p.-real estate development; Douglas N. Lunau, v.p.-procurement services; Sheldon Douglass, v.p.-financial services; Wayne E. East, v.p.-information services; David Bragg, controller; James H. Farrell, v.p., general counsel & secretary; John N. McCullogh, v.p. & asst. gen. counsel; John W. Thompson, v.p.-finance; Donald G. Reid, treasurer; Dorothy M. Leamen, Stewart E. Green, asst. secretaries; Shimona Petroff, asst. treasurer; Richard P. Mavrinac, tax officer.

DIRECTORS: W. Galen Weston, chairman, Richard J. Currie, Charles M. Humphrys, Robert H. Kidd, Roger A. Lindsay, Arthur H. Mingay, David A. Nichol, George B. Robertson.

BUSINESS ACTIVITIES: A Canadian holding company controlling major interest in food retailing and wholesaling in Canada and the United States. In addition to its food-related operations, Loblaw, through its subsidiaries, also participates in the Canadian general merchandise industries.

NUMBER OF STORES: 381

RETAIL SALES (1984): $6,419,400,000

## LUCKY STORES, INC.

6300 Clark Avenue
P.O. Box BB
Dublin, California 94566
(415) 828-1000

OFFICERS: S. Donley Ritchey, chairman & chief executive officer; John M. Lillie, President and chief operating officer; Kenneth W. Cope, sr. v.p.-administration; Lawrence A. DelSanto, sr. v.p.-gen. mdse.; Theodore F. Brunner, sr. v.p.-manufacturing & support facilities; Ivan Owen, sr. v.p. & chief financial officer; Leon W. Roush, sr. v.p.-food operations; Anne C. Broone, v.p. & conroller; Richard C. Biagi, v.p.-real estate; Alan R. Ceccanti, v.p.-meat operations; Lester C. Kranhold, v.p.-engineering; Frank J. Dorsey, v.p.-warehousing, distribution and store systems; Raymond H. Sweeney, v.p.-industrial relations; R. Lee Paulson, v.p.-management information systems; Richard M. Brooks, v.p.-finance & treasurer; James R. Clark, v.p.-planning; Christopher McLain, v.p., counsel & secretary.

DIRECTORS: Gerald A. Awes*, William H. Dyer, Jr.*, Ivan Owen, Dwight E. Stanford, Stanley Hiller, Jr., Walter E. Hoadley, John H. Hoefer, Joseph A. Woods, Jr., Don C. Frisbee, Forrest A. Plant, Mary E. Lanigar, S. Donley Ritchey*, John M. Lillie*, Melvin B. Lane.

* Member of Executive Committee.

BUSINESS ACTIVITIES: Operates a chain of food units consisting of supermarkets, discount centers and food department stores; Lucky Discount Supermarkets are located in Western states; Food Basket in San Diego County, California; Kash N'Karry in Florida; Eagle Discount Supermarkets in the Midwest and Texas.

NUMBER OF STORES: 622

RETAIL SALES (1984)*: $9,236,529,000

* 53 weeks

## MARSH SUPERMARKETS, INC.

P.O. Box 155
501 Depot Street
Yorktown, Indiana 47396
(317) 759-8101

OFFICERS: William P. Givens, chairman of the board; Don E. Marsh, president & chief exec. officer; C. Alan Marsh, exec. vice president; William L. Marsh, v.p.-real estate; Donald M. Rix, v.p.-merchandising; Ronald R. Walicki, v.p.-convenience store operations; P. Lawrence Butt, v.p. & counsel; Porter Eckerty, v.p.-supermarket operations; Kenneth D. Kelly, v.p.-warehousing & transportation; John S. Hayford, v.p.-finance & treasurer; John W. Laboda, v.p.-Management Information Systems; Ronald P. Stolz, asst. v.p.-administration; Mary B. Needler, asst. secretary & asst. treasurer; David M. Redden, v.p.-personnel; Lois A. Gross, asst. secretary.

DIRECTORS: Jack E. Buckles, William P. Givens, Don E. Marsh, Estel V. Marsh, C. Alan Marsh, Garnet Marsh, Van P. Smith, Charles R. Clark, Stephen M. Huse, Durward S. Doyle.

BUSINESS ACTIVITIES: Operates supermarkets, combination food and drug stores, and Village Pantry convenience stores in Indiana and Ohio. Also operates 5 fresh product markets under the name of "Farmers' Market".

NUMBER OF STORES: 228

RETAIL SALES (1985): $628,146,000

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## NASH FINCH COMPANY

3381 Gorham Avenue
St. Louis Park, Minnesota 55426
(612) 929-0371

OFFICERS: Thomas A. Riley, chairman of the board; Harold B. Finch, Jr., president & chief executive officer; R.N. Mammel, exec. v.p.; Alan W. Clark, senior vice president; Arthur C. Wangaard, Jr., v.p. & secretary; J.O. Rodysill, v.p.; Robert F. Nash, treasurer; Burton M. West, Philip E. Bortscheller, assistant treasurers; J.F. Shekleton, controller; N.R. Soland; Walter G. Hreno, asst. secretary.

DIRECTORS: Thomas A. Riley*, chairman; Floyd C. Ashley*, Alan W. Clark*, Ann M.. Crowley, Harold B. Finch, Jr.*, R.N. Mammel*, Donald R. Miller, Robert F. Nash *, J.O. Rodysill, J.F. Shekleton, Arthur C. Wangaard, Jr.*, Richard A. Fisher, Richard G. Lareau.

* Member of the Executive Committee

BUSINESS ACTIVITIES: Owns and operates 92 supermarkets, warehouse stores, membership food markets and Family Thrift Centers. Its 12 food distribution centers supply 376 affiliated supermarkets and over 1,200 independent retailers and institutions. The firm also owns a produce marketing subsidiary in California, which sells fresh fruits and vegetables to large wholesalers and chain retailers.

NUMBER OF STORES: 92

RETAIL SALES (1984): $1,238,318,783

## THE OSHAWA GROUP LIMITED

302 The East Mall
Islington, Ontario, Canada M9B 6B8
(416) 236-1971

OFFICERS: Ray D. Wolfe, chairman of the board & chief exec. officer; Allister P. Graham, president & chief operating officer; Philip F. Connell, sr. v.p. & chief financial officer; William L. Atkinson, group v.p.-general merchandise; Jack B. Wolfe, group v.p.-food service and produce companies; Sam Crystal, v.p.-public affairs; Paul B. Nielsen, v.p.-industrial relations; Matilda Manojlov, v.p.-profit improvement; Sidney Pasoff, v.p.-management informations services; Murray C. Goldman, v.p.-development; Donald A. Smith, v.p.-human resources; E. Leonard Besler, controller; Leonard Eisen, treasurer; Harld J. Wolfe, secretary & general counsel.

DIRECTORS: William L. Atkinson, Murray C. Goldman, Allister P. Graham, Albert Shifrin, Charles Perrault, Arthur J.R. Smith, Harold J. Wolfe, Harvey S. Wolfe, Philip F. Connell, Ray D. Wolfe, Jonathan B. Wolfe.

BUSINESS ACTIVITIES: Canadian food supplier through retail outlets in Ontario, Quebec, the Atlantic provinces, Manitoba and Saskatchewan. These comprise franchise markets (including IGA markets) as well as company-owned food markets (Food City Markets, Dutch Boy Food Markets). Also a food wholesaler (Codville Distributors in Manitoba, Saskatchewan and Northwestern Ontario; Toronto Food Division in Ontario; Hudon et Deaudelin Limitee in Quebec and Bolands in the Atlantic Provinces) and food supplier to institutional customers (Hickeson-Langs Supply Company).

NUMBER OF STORES: 1,094

RETAIL SALES (1985): $2,665,774,000

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## PACIFIC GAMBLE ROBINSON CO.

4103 Second Avenue
Seattle, Washington 98134
(206) 624-0111

OFFICERS: Douglas S. Gamble, president; E.A. Thompson, exec. vice president; Donald P. Gamble, Jr., vice president; E.W. Sandygren, v.p. & secretary; John L. Knutson, treasurer; Richard Elzner, Ethel E. Ratfield, Douglas R. Hendel, asst. secretaries.

DIRECTORS: Mervin Arenchild, Douglas S. Gamble*, E.A. Thompson*, Donald P. Gamble, Jr., Douglas R. Hendel, Norman C. Morrison, E.W. Sandygren*, Virginia L. Parks, George K. Godko, Hans G. Willers.

* Member of Executive Committee.

BUSINESS ACTIVITIES: Operates 25 conventional supermarkets (Family Market and Tradewell Stores) and 60 wholesale type markets (Prairie Markets). These stores are located in Oregon, Washington and California. Also conducts shipping, distributing and trucking operations.

NUMBER OF STORES: 85

RETAIL SALES (1984): $842,074,626

## PUEBLO INTERNATIONAL, INC.

Loiza Expressway
Corner of Campo Rico Avenue
Carolina, Puerto Rico 00630

375 Park Avenue
New York, New York 10152
(212) 935-1710

OFFICERS: Harold Toppel, chairman of the board; David W. Morrow, president and chief operating officer; Manuel I. Vallecillo, vice chairman; Revenol Duryear, vice chairman; Walter O. Joachim, exec. v.p.; Milton Toppel, v.p.; Agustin Borrero, sr. v.p.-finance & administration & treasurer; Robert Locke, v.p.-planning & development & asst. secretary; Jesus Jaen, controller & asst. secretary; Stefani Pepe, Rafael Torres, asst. secretaries & asst. treasurers.

DIRECTORS: Harold Toppel*, William C. Lang*, George Toppel*, Milton Toppel*, Manuel Vallecillo*, A. Michael Victory, Abraham Zaleznik, Guillermo Rodriquez-Benitez, Revenol Duryea*, Carlos O. Souffront, Richard W. McEwan, David W. Morrow.

* Member of Executive Committee.

BUSINESS ACTIVITIES: Operates Pueblo Supermarkets, conventional and warehouse-type stores, in Puerto Rico and the U.S. Virgin Islands. Also operates a bakery in Venezuela and a wholesale cash-and-carry operation in Florida.

NUMBER OF STORES: 42

RETAIL SALES (1985): $518,335,000

## SAFEWAY STORES, INCORPORATED

Fourth and Jackson Streets
Oakland, California 94660
(415) 891-3000

OFFICERS: Peter A. Magowan, chairman & chief executive officer; James A. Rowland, president & chief operating officer; Edward N. Henney, exec. v.p.-supply operations; E. Richard Jones, exec. v.p.-information services & planning; Harry D. Sunderland, exec. v.p. & chief financial officer; John Bell, Johns S. Kimball, William H. Maloney, Donald J. Smith, group v.p.'s; Robert H. Kinnie, v.p., chairman, president & chief exec. officer-Canada Safeway Limited; William M. Almbers, sr. v.p.-distribution; Robert E. Bradford, sr. v.p.-public affairs; F. J. Dale, sr. v.p. & controller; Roderick W. Davis, sr. v.p.-management information systems; Philip G. Horton, sr. v.p.-real estate & engineering; John L. Morris, sr. v.p. & corporate economist; John H. Printster, sr. v.p.-marketing; John L. Repass, sr. v.p.-human resources; Bernat Rosner, sr. v.p., law secretary & general counsel, Patrick S. Totman, sr. v.p.-finance.

DIRECTORS: John F. Bookout, Dale L. Lynch, William H. Webster, Brayton Wilbur, Jr., Percy Chubb III, Mary Gardiner Jones, Harry D. Sunderland, James R. Harvey, Roger D. Lapham, Jr., James A. Rowland, Merrill L. Magowan, W.S. Mitchell, Edward N. Henney, Marjorie S. Kinney, Peter A. Magowan, Samuel H. Armacost, Peter C. Bawden, Steven Muller.

BUSINESS ACTIVITIES: Operates a chain of supermarkets in the United States, Canada, The United Kingdom, West Germany and Australia.

NUMBER OF STORES: 2,571

RETAIL SALES (1984): $19,642,201

## SHOPWELL, INC.

400 Walnut Avenue
Bronx, New York 10454
(212) 579-3400

OFFICERS: Martin Rosengarten, chairman of the board, president & chief executive officer; Jay M. Rosengarten, exec. v.p. & chief financial & administrative officer; Glen Rosengarten, exec. v.p. & chief operating officer; Alan H. Olstein, v.p.-sales & merchandising; David Smithies, v.p.-human resources; Stuart Spivak, v.p. & controller, Lawrence R. Buxbaum, v.p.-real estate & secretary; Abraham Laxer, v.p.-advertising; Paul Farro, v.p.-labor relations; Robert Klanfer, v.p.-planning and corporate systems; Louis Ruggiero, v.p.-Shopwell division.

DIRECTORS: Herbert B. Daitch*, Walter Feldesman*, Arthur I. Meyer, Martin Rosengarten*, Fred Siegel*, John L. Procope*, Ted Petrillo*, Glen Rosengarten*, Jay M. Rosengarten*, Albert G. Lowenthal, Stephen E. Miron, Arthur I. Meyer.

* Member of Executive Committee.

BUSINESS ACTIVITIES: Operates a chain of conventioanl department supermarkets. Store operates under the name of Daitch-Shopwell Supermarkets. Shopwell Supermarkets, and Daitch Dairy Stores are located in the metropolitan New York area, Westchester, Rockland, Putnam and Nassau Counties in New York State and Connecticut. In addition, the Company operates a convenience store and a Shopwell package store.

NUMBER OF STORES: 58

RETAIL SALES (1984): $557,156,768

## STEINBERG INC.

Alexis Nihon Plaza
1500 Atwater Avenue
Montreal, Quebec, Canada H3Z 1Y3
(514) 931-9131

OFFICERS: Melvyn A. Dobrin, chairman of the boa[illegible] & chief executive officer; Nathan Steinberg, vice-chairman of the board & sr. v.p.; Irving Ludmer, president & chief operating officer; Mitzi S. Dobrin, exec. v.p.-legal & corp. affairs; H. Arnold Steinberg, exec. v.p.-finance & development; Henri Tremblay, group v.p.-human resources; Alain B. Bilodeau, v.p.-labour relations; William Howieson, v.p.-treasurer and comptrolier; Diane Marcelin Laurin, v.p.-general counsel & secretary; Pierre de Grandpreq, v.p.; Norman Auslander, exec. v.p.-supermarket division, Canada & gen. mgr., Ontario Div.; Soly Cohen, group v.p. & gen. merchandise mgr.-Miracle Mart Div., Morris Ladenhein, group v.p. and general manager-Valdi Inc., Douglas R. Stewart, group v.p. and gen. mgr.-Quebec division, Michel Beland, asst. sec.

DIRECTORS: Donald G. Campbell, Andre Charron, J.V. Raymond Cyr, Melvin Dobrin*, Mitzi S. Dobrin*, Lazarus Phillips, Gerard Plourde*, H. Arnold Steinberg*, Nathan Steinberg*, Peter F. McGoldrick*, Irving Ludmer.

BUSINESS ACITIVITES: Operates food stores in the provinces of Quebec, New Brunswick, and Ontario. Businesses include restaurants, flour milling, bakery and food processing operations, with restaurant activities in Manitoba, and box stores in Ontario, Manitoba, Saskatchewan and Alberta.

NUMBER OF STORES: 550

RETAIL SALES (1984): $3,452,275,000

## THE STOP & SHOP COMPANIES, INC.

P.O. Box 369
Boston, Massachusetts 02101
(617) 770-8000

OFFICERS: Avram J. Goldberg, chairman of the board; Carol R. Goldberg, president & chief operating officer; Albert S. Frager, sr. v.p. treasurer & chief financial officer; Robert J. Levin, vice chairman of the board; Anthony DiNardo, sr. v.p.; Harold Frank, sr. v.p., chairman and C.E.O.-Bradlees dept. stores; Samuel W.W. Mandell, v.p.-gen. counsel, clerk & secretary; Daniel Donegan, v.p.-distribution & management information planning; Harold E. Fine, v.p.- engineering and construction; Arthur S. Robbins, v.p.-financial services & asst. treasurer; Charles Richards, v.p.-corporate properties; Joseph D. McGlinchey, v.p.-finance & chief accounting officer; William Vaughn, III, v.p.-labor relations; Rufus E. Lester, group v.p.-public policy & technical affairs, Edward W. Barr, v.p.-personnel; Aileen Gorman, v.p.-public affairs.

DIRECTORS: Norman I. Cahners, Clifton B. Cox, Julian I. Edison, Avram J. Goldberg*, Irving W. Rabb*, Norman S. Rabb, Sidney R. Rabb*, William W. Wolbach, Albert S. Frager, Carol R. Goldberg, John G.L. Cabot, Phyllis A. Wallace, William F. Pounds, Robert J. Levin, Harold Frank, Roderick McDougall.

* Member of the Executive Committee.

BUSINESS ACTIVITIES: Operates Stop & Shop supermarkets in Connecticut, Massachusetts, New Hampshire, New York, Rhode Island and Virginia.

NUMBER OF STORES: 119

RETAIL SALES (1985): $3,247,298,000

# .SUPER VALUE STORES, INC.

P.O. Box 990
Minnesota, Minneapolis, 55440
(612) 828-4000

OFFICERS: Michael W. Wright, chairman, president & chief executive officer; John E. Morrissey, sr. v.p.-distribution; John B. Ferris, sr. v.p.-finance; William S. Bailey, v.p. & pres.-County Seat Stores; Thomas L. Dekko, v.p.-sales; Charles D. Dugan, Jr., v.p.-legal & secretary; J. Gary Rhymes, controller; Ronald C. Tortelli, v.p.-human resources; Sumner H. Goldman, v.p.-merchandising; Lloyd Stenbeck, v.p.-store engineering; Gene D. Hoffman, sr. v.p. & pres.-Wholesale Food Companies; John J. Prior, v.p.-labor relations; Robert O. Erickson, v.p.-market development; David A. Cairns, treasurer; William C. Hunt, asst. secretary; William J. Tyrrell, v.p. & pres.-ShopKo Stores.

DIRECTORS: Morris Lewis, Jr., Jack J. Crocker, James P. McFarland, James T. Wyman, Albert R. Whitman, William S. Bailey, John E. Morrissey, Michael W. Wright, Arnold R. Weber, Harriet Perlmutter, Vernon H. Heath, Steven I. D'Agostino, Richard D. McCormick.

BUSINESS ACTIVITIES: Engaged primarily in the supplying and servicing of over 2,300 retail food stores in 27 states from sixteen distribution centers. Independent retailers own and operate 2,200 of the retail food stores and the Company owns all or a majority interest of the reamining 79 stores. Most of the stores operate under one of the Super Valu licensed or sub-licensed names: Super Valu, IGA, Sure Save, U-Save, Disco, Super Dollar, Sunflower, Banner and Mr. Quik.

NUMBER OF STORES: 79

RETAIL SALES (1984): $5,922,681,000

## SUPERMARKETS GENERAL CORPORATION

301 Blair Road
Woodbridge, New Jersey 07095
(201) 499-3000

OFFICERS: Alex Aidekman, chairman of the board, Leonard Lieberman, president & chief exec. officer; Stanley Abramson, exec. v.p. & group exec.-General Merchandise Divisions; Bernard Paroly, exec. v.p. & chairman-Pathmark Division; James D. Dougherty, exec. v.p., secretary & general counsel; Murray Levine, sr. v.p. & controller; Harvey M. Gutman, v.p.-planning & research; Jerome Katcher, v.p.-technical services; Arnold J. Pearl, v.p.-real estate & store development; Jeffrey C. Girard, treasurer.

DIRECTORS: Alex Aidekman, J. Kenneth Boyles, Leonard Lieberman, Raymond J. Peterson, Stanley Abramson, Harvey M. Krueger, Fred R. Sullivan, Bernard Paroly, Claudine Malone, Robert I. Smith, Norman M. Hinerfield, Alan Sagner, Robert Marks, Josh S. Weston.

BUSINESS ACTIVITIES: Operates a chain of supermarkets under the Pathmark name in New York, New Jersey, Connecticut, Delaware and Pennsylvania.

NUMBER OF STORES: 175

RETAIL SALES (1984)*: $4,346,680,000

* 53 weeks

## WALDBAUM, INC.

Hemlock Street and Boulevard Avenue
Central Islip, New York 11722
(516) 582-9300

OFFICERS: Ira Waldbaum, president; Aaron Malinsky, exec. v.p.; Ernest Brown, sr. v.p.-sales & merchandising; George Brown, sr. v.p.-store oeprations; Jack Kaufman, v.p.-finance; Melvin Levy, v.p.-industrial relations; Martin Krichmar, v.p.-produce; Stanley Lang, v.p.-store operations; Dominic Piccininni, v.p.-safety & claims; Martin Waldbaum, v.p.-non-foods; Sidney Zukerman, v.p.-advertising; Erwin Hartman, v.p.-deli operations; Sheldon Levine, v.p.-securities; Robert Perfidio, v.p.-distribution; Louis Sollicito, v.p.-meat operations; Julia Waldbaum secretary.

DIRECTORS: Ira Waldbaum, Julia Waldbaum, Philip Greene, Kenneth Gordon, Aaron Malinsky.

BUSINESS ACTIVITIES: Operates a chain of Waldbaum's supermarkets in Brooklyn, The Bronx, Staten Island, Queens, Nassau, Suffolk, Westchester, and Rockland counties in New York State and in Connecticut; also operates Food Mart Supermarkets in Connecticut and Massachusetts.

NUMBER OF STORES: 141

RETAIL SALES (1984): $1,711,923,000

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## WEIS MARKETS, INC.

1000 South Second Street
Sunbury, Pennsylvania 17801
(717) 286-4571

OFFICERS: Sigfried Weis, President; Robert F. Weis, vice president & treasurer; Michael C. Rheam, vice president & secretary; Richard D. Madison, v.p.-merchandising; Alan L. Barrick, v.p.-engineering & manufacturing; Walter B. Bruce, v.p.-private label; Kenneth M. Gingrich, v.p. & controller; George J. Michalak, v.p.-perishables; John W. Phillips, v.p.; Norman S. Rich, v.p.-store operations; Richard L. Wetzel, v.p.-accounting.

DIRECTORS: Sigfried Weis, Robert F. Weis, Michael C. Rheam, Charles H. Watts, II, Peter M. Sacerdote.

BUSINESS ACTIVITIES: Operates supermarkets in Pennsylvania, New York and Maryland, under the name of Weis Markets. The Sunbury Wholesale Seafood Company specializes in the distribution of frozen seafood and grocery items to restaurants and institutions. Also operates 8 Amity House Restaurants.

NUMBER OF STORES: 119

RETAIL SALES (1984): $957,775,000

## WINN-DIXIE STORES, INC.

5050 Edgewood Court
Post Office Box B
Jacksonville, Florida 32203
(904) 783-5000

OFFICERS: Robert D. Davis, chairman of the board; A. Dano Davis, president, F.L. James, exec. v.p.; S.W. Evans, R.J. Holmes, James Kufeldt, C.H. McKellar, senior v.p.'s; T. Wayne Davis, T.N. Alexander, W.F. Brim, O.D. Carpenter, J.H. Childers, C. Lester Cotton, R.J. Ehster, F.W. Hammond, W.M. Harris, H.E. Hess, J.D. James, D.L. Kimsey, L.G. Libby, R.W. Massey, H.E. Miller, H.F. Minshew, T.H. Moss, L.P. Perry, C.R. Raulerson, L.J. Sadlowski, E.T. Walters, C.E. Winge, G.P. Woodard, J.J. Pecnik, R.P. McCook, Jack P. Jones, vice presidents; W.F. Fant, treasurer; J. Shephard Bryan, v.p., gen. counsel & secretary D.H. Bragin, controller.

DIRECTORS: R.D. Davis*, chairman; James E. Davis*, A.D. Davis*, A. Dano Davis*, T. Wayne Davis, Jr., J. Shepard Bryan, Jr.*, Radford D. Lovett, J.C. Pace, Jr., Charles P. Stephens, C.W. Waldorf*, Sam M. Walton, F.L. James*.

* Member of the Executive Committee.

BUSINESS ACTIVITIES: Operates Winn-Dixie food stores in Florida, Georgia, North Carolina, South Carolina, Alabama, Mississippi, Louisiana, Virginia, Kentucky, Tennessee, Indiana, Oklahoma and Texas.

NUMBER OF STORES: 1,231

RETAIL SALES (1984): $7,302,369,000

# SECTION 4

# GROCERY STORE STATISTICAL PROFILE

The information contained in this section consists of data based on reports from the U.S. Bureau of the Census, Food Marketing Institute and other trade sources as compiled by the Market Research Department and The Special Projects Division of Fairchild Books.

## GROCERY STORE FIRMS BY SALES SIZE, 1982

|  | Firms |  | Number of Stores | Sales |  |
|---|---|---|---|---|---|
|  | Number | % |  | Mil. $ | % |
| Firms, Total | 81,478 | 100.0% | 128,494 | $226,609 | 100.0% |
| Annual Sales |  |  |  |  |  |
| $10,000,000 or more | 1,460 | 1.9 | 43,945 | 167,691 | 74.0 |
| $ 5,000,000 - 9,999,000 | 1,799 | 2.4 | 4,240 | 12,690 | 5.6 |
| $ 2,500,000 - 4,999,000 | 4,030 | 5.3 | 6,168 | 14,276 | 6.3 |
| $ 1,000,000 - 2,499,000 | 8,939 | 11.8 | 10,922 | 14,276 | 6.3 |
| Less than $1,000,000 | 59,429 | 78.6 | 63,091 | 17,676 | 7.8 |

## CONCENTRATION OF SALES AMONG LARGEST GROCERY STORE FIRMS, 1982

|  | Stores |  | Sales |  | Payroll (Entire year) |  |
|---|---|---|---|---|---|---|
|  | Number | % | Mil. $ | % | Mil. $ | % of Sales |
| All firms (81,478) | 128,494 | 100.0% | 226,609 | 100.0% | $21,364 | 9.4% |
| 4 largest firms | 4,751 | 3.7 | 37,109 | 16.4 | 3,897 | 10.5 |
| 8 largest firms | 11,528 | 9.0 | 54,504 | 24.1 | 5,544 | 10.2 |
| 20 largest firms | 14,500 | 11.3 | 80,623 | 35.6 | 8,151 | 10.1 |
| 50 largest firms | 20,137 | 15.9 | 101,184 | 44.7 | 10,042 | 9.9 |

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1982.

# GROCERY STORE FIRMS, NUMBER OF STORES OPERATED & SALES, 1982

| | Firms | | Stores | | Sales | |
|---|---|---|---|---|---|---|
| | Number | % | Number | % | Mil. $ | % |
| Total | 81,478 | 100.0% | 128,494 | 100.0% | $224,454* | 100.0% |
| Single units | 76,112 | 93.4 | 76,112 | 59.2 | 52,263 | 23.3 |
| Multi units | 5,366 | 6.6 | 52,382 | 40.8 | 172,191 | 76.7 |
| 2 - 4 stores | 4,276 | 5.2 | 8,584 | 6.7 | 18,843 | 8.4 |
| 5 - 9 stores | 546 | 2.9 | 3,460 | 2.7 | 10,853 | 4.8 |
| 10 or more stores | 730 | | 40,338 | 31.4 | 142,495 | 63.5 |
| 10 - 24 stores | 317 | | 4,688 | 3.6 | 14,617 | 6.5 |
| 25 - 49 stores | 95 | | 3,321 | 2.6 | 12,501 | 5.6 |
| 50 or more | 318 | | 32,329 | 25.2 | 115,377 | 51.4 |

*Does not include sales of firms not in business at end of year amounting to $2.2 billion.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1982.

# GROCERY STORES (INDIVIDUAL STORES) BY SALES SIZE, 1982, 1977

| | 1982 | | | | 1977 | | | |
|---|---|---|---|---|---|---|---|---|
| | | | Sales | | | | Sales | |
| | Number | % | Mil. $ | % | Number | % | Mil. $ | % |
| Grocery stores, total | 128,494 | | $226,609 | | 178,835 | | $147,758 | |
| In business entire year | 121,039 | 100.0% | 214,868.4 | 100.0% | 156,098 | 100.0% | 139,916 | 100.0% |
| $ 5,000,000 or more | 14,022 | 11.6 | 128,796.9 | 59.9 | 9,678 | 6.2 | 53,028 | 37.9 |
| $ 2,500,000 - 4,900,000 | 9,839 | 8.1 | 35,920.3 | 16.7 | 21,073 | 13.5 | 50,510 | 36.1 |
| $ 1,000,000 - 2,490,000 | 13,758 | 11.4 | 21,443.8 | 10.0 | 12,488 | 8.0 | 13,292 | 9.5 |
| $ 500,000 - 990,000 | 20,501 | 16.9 | 14,498.5 | 6.7 | 16,078 | 10.3 | 8,115 | 5.8 |
| Under $ 500,000 | 62,919 | 52.0 | 14,208.9 | 6.6 | 96,781 | 62.0 | 14,971 | 10.7 |

Source: U.S. Bureau of the Census,
Censuses of Retail Trade, 1977, 1982

# GROCERY STORES WITH PAYROLL: SALES BY TYPE OF MERCHANDISE, 1982, 1977

| | 1982 | | | | 1977 | | | |
|---|---|---|---|---|---|---|---|---|
| | Stores | | Sales | | Stores | | Sales | |
| | Number | % | Mil. $ | % | Number | % | Mil. $ | % |
| Total | 128,494 | 100.0% | 226,609 | 100.0% | 126,635 | 100.0% | $143,938 | 100.0% |
| Groceries & other foods | 128,494 | 100.0% | 177,233 | 78.2 | 126,635 | 100.0 | 122,137 | 84.9 |
| Meat, fish, poultry | 90,252 | 70.2 | 39,302 | 17.3 | 103,761 | 81.9 | 27,605 | 19.2 |
| Fresh fruits and vegetables | 80,701 | 62.8 | 15,313 | 6.8 | 94,834 | 74.9 | 10,063 | 7.0 |
| Frozen foods | 89,833 | 69.9 | 9,602 | 4.2 | 98,545 | 77.8 | 6,367 | 4.4 |
| Dairy products | 106,210 | 82.7 | 16,723 | 7.4 | 107,272 | 84.7 | 11,221 | 7.8 |
| Bakery products except frozen | 97,296 | 75.7 | 6,710 | 3.0 | 93,281 | 73.7 | 4,895 | 3.4 |
| Delicatessen items | 56,286 | 43.8 | 5,554 | 2.5 | 51,620 | 40.8 | 3,913 | 2.7 |
| All other foods | 121,862 | 94.8 | 84,029 | 37.1 | 121,254 | 95.7 | 58,073 | 40.3 |
| Packaged alcoholic beverages | 73,624 | 57.3 | 7,508 | 3.3 | 58,813 | 46.4 | 3,652 | 2.5 |
| Tobacco products | 95,049 | 74.0 | 7,596 | 3.4 | 83,704 | 66.1 | 3,484 | 2.4 |
| Drugs, health aids, and beauty aids | 85,641 | 66.6 | 7,792 | 3.4 | 115,660 | 91.3 | 856 | .6 |
| Soaps, detergents and cleaners | 69,815 | 54.3 | 5,410 | 2.4 | 71,883 | 56.8 | 2,822 | 2.0 |
| Paper products | 69,191 | 53.8 | 5,125 | 2.3 | 72,949 | 57.6 | 2,421 | 1.7 |
| Apparel, except footwear | | | | | | | | |
| Men's & boys' | 3,509 | 2.7 | 123 | .1 | 4,247 | 3.3 | 121 | .1 |
| Women's & girls' | 3,905 | 3.0 | 142 | .1 | 4,473 | 3.5 | 173 | .1 |
| Kitchenware & home furnishings | 17,638 | 13.7 | 1,293 | .6 | 12,721 | 10.0 | 529 | .4 |
| Hardware, plumbing, and electrical supplies | 9,740 | 7.6 | 369 | .2 | 7,023 | 5.5 | 143 | .1 |
| Lawn, garden supplies | 6,018 | 4.7 | 362 | .2 | 3,646 | 2.9 | 104 | .1 |
| Auto fuels, lubricants | 26,032 | 20.3 | 5,635 | 2.5 | 12,851 | 10.1 | 763 | .5 |
| Meals, snacks | 37,498 | 29.2 | 1,257 | .6 | 22,500 | 17.8 | 347 | .2 |
| Other, incl. non merchandise | -- | -- | -- | -- | 105,188 | 83.1 | 2,955 | 2.1 |

## GROCERY STORES: ESTIMATED NUMBER OF STORES & SALES, 1974-1984

| | | ALL GROCERY STORES | CHAIN GROCERY STORES* | |
|---|---|---|---|---|
| YEAR | NUMBER | SALES (MIL. $) | SALES (MIL. $) | % OF TOTAL GROCERY STORE SALES |
| 1974 | 191,000 | 116,056 | 62,614 | 54.0 |
| 1975 | 190,000 | 128,061 | 68,441 | 53.4 |
| 1976 | 189,000 | 137,122 | 73,505 | 53.6 |
| 1977 | 178,835 | 147,142 | 83,269 | 56.6 |
| 1978 | 169,500 | 161,527 | 91,700 | 56.8 |
| 1979 | 168,900 | 188,551 | 92,900 | 49.3 |
| 1980 | 167,100 | 220,800 | 103,115 | 46.7 |
| 1981 | 165,000 | 240,900 | 119,905 | 49.8 |
| 1982 | 162,000 | 252,000 | 124,382 | 49.4 |
| 1983 | 158,000 | 263,800 | 130,100 | 49.3 |
| 1984 | 128,494 | 254,878 | 163,827 | 60.7 |

* Stores in organizations of 11 or more stores with sales of $25 million or more.

## SUPERMARKETS: ESTIMATED NUMBER OF STORES & SALES, 1974-1984

| YEAR | NUMBER | % OF TOTAL GROCERY STORES | SALES (MIL. $) | % OF TOTAL GROCERY STORE SALES |
|---|---|---|---|---|
| 1974 | 31,000 | 16.2% | $ 86,029 | 74.1% |
| 1975 | 31,000 | 16.3 | 94,653 | 73.9 |
| 1976 | 30,700 | 16.2 | 101,373 | 73.9 |
| 1977 | 30,500 | 17.1 | 109,483 | 74.4 |
| 1978 | 33,400 | 19.7 | 138,470 | 85.7 |
| 1979 | 33,600 | 19.9 | 154,100 | 81.7 |
| 1980 | 34,900 | 20.9 | 170,700 | 77.3 |
| 1981 | 28,680 | 17.4 | 171,620 | 71.2 |
| 1982 | 28,950 | 17.9 | 180,700 | 71.7 |
| 1983 | 29,550 | 18.7 | 189,170 | 71.7 |
| 1984 | 29,080 | 11.4 | 193,106 | 71.5 |

Note: A supermarket is defined as a grocery store with annual sales volume of $2 million or more.

Source: Fairchild Market Research Department estimates based on U.S. Census Bureau reports and trade reports.

## DISTRIBUTION OF GROCERY STORE SALES BY GEOGRAPHIC REGION

| | 1984 | 1983 | 1982 | 1981 |
|---|---|---|---|---|
| U.S. Total | 100.0% | 100.0% | 100.0% | 100.0% |
| Northeastern States (New England, Middle Atlantic) | 20.8 | 20.4 | 20.3 | 21.1 |
| North Central States (East North Central, West North Central) | 23.0 | 23.4 | 23.7 | 23.9 |
| South (South Atlantic, East South Central, West South Central | 34.9 | 35.1 | 35.2 | 34.3 |
| West (Mountain, Pacific) | 21.3 | 21.1 | 20.8 | 20.7 |

## PER CAPITA SALES OF GROCERY STORES BY GEOGRAPHIC REGION

| | 1984 | 1983 | 1982 | 1981 | 1980 | % Change in Sales 1984/1983 |
|---|---|---|---|---|---|---|
| U.S. Total | 1,062 | $ 966 | $ 987 | $ 995 | $ 860 | + 9.0% |
| Northeastern States | 1,054 | 996 | 1,027 | 947 | 846 | + 5.5 |
| North Central States | 977 | 1,038 | 1,062 | 889 | 802 | - 6.5 |
| South | 1,083 | 938 | 949 | 974 | 879 | + 13.4 |
| West | 1,139 | 902 | 926 | 1,019 | 919 | + 20.8 |

Source: Based on U.S. Bureau of the Census reports and Sales and Marketing Management 1985 Survey of Buying Power Data Service.

# PERCENTAGE OF GROCERY STORE SALES BY MONTHS, 1980-84

| MONTH | 1984 | 1983 | 1982 | 1981 | 1980 |
|---|---|---|---|---|---|
| January | 7.7% | 7.7% | 8.0% | 8.1% | 8.0% |
| February | 7.6 | 7.3 | 7.4 | 7.3 | 7.9 |
| March | 8.4 | 8.1 | 8.0 | 7.9 | 8.2 |
| April | 7.9 | 8.3 | 8.2 | 8.1 | 8.2 |
| May | 8.5 | 8.3 | 8.5 | 8.6 | 8.1 |
| June | 8.7 | 8.4 | 8.3 | 8.3 | 8.3 |
| July | 8.5 | 8.9 | 9.0 | 8.8 | 8.3 |
| August | 8.7 | 8.5 | 8.2 | 8.5 | 8.5 |
| September | 8.3 | 8.5 | 8.3 | 8.2 | 8.5 |
| October | 8.3 | 8.4 | 8.6 | 8.8 | 8.6 |
| November | 8.4 | 8.3 | 8.2 | 8.2 | 8.6 |
| December | 9.0 | 9.3 | 9.3 | 9.2 | 8.8 |
| Year | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Based on U.S. Bureau of the Census reports.

## DISTRIBUTION OF THE U.S. RESIDENT POPULATION, PERSONAL INCOME & SUPERMARKET SALES, BY STATE & REGION, 1984

| | Population | Income | Supermarket Sales |
|---|---|---|---|
| U.S. Total, (mil. $) | 238.3<br>100.0% | $2,576.5<br>100.0% | $ 253.4<br>100.0% |
| New England | 5.3 | 5.9 | 6.0 |
| Conn. | 1.3 | 1.7 | 1.5 |
| Maine | .5 | .4 | .6 |
| Mass. | 2.4 | 2.7 | 2.6 |
| New Hamp. | .4 | .4 | .6 |
| Rhode Island | .4 | .4 | .4 |
| Vermont | .3 | .2 | .3 |
| Middle Atlantic | 15.7 | 16.9 | 14.8 |
| New Jersey | 3.2 | 3.9 | 3.4 |
| New York | 7.5 | 8.2 | 6.7 |
| Pa. | 5.0 | 4.9 | 4.7 |
| East No. Central | 17.5 | 17.5 | 15.4 |
| Illinois | 4.8 | 5.2 | 4.0 |
| Indiana | 2.3 | 2.1 | 2.2 |
| Michigan | 3.9 | 3.8 | 3.3 |
| Ohio | 4.5 | 4.4 | 4.2 |
| Wisconsin | 2.0 | 2.0 | 1.7 |
| West No. Central | 7.4 | 7.4 | 7.6 |
| Iowa | 1.2 | 1.2 | 1.3 |
| Kansas | 1.0 | 1.1 | 1.1 |
| Minnesota | 1.8 | 1.8 | 1.8 |
| Missouri | 2.1 | 2.0 | 2.3 |
| Nebraska | .7 | .7 | .6 |
| North Dakota | .3 | .3 | .2 |
| South Dakota | .3 | .3 | .3 |
| South Atlantic | 16.8 | 15.8 | 16.9 |
| Delaware | .3 | .3 | .3 |
| D.C. | .3 | .3 | .2 |
| Florida | 4.7 | 4.7 | 5.0 |
| Georgia | 2.5 | 2.2 | 2.3 |
| Maryland | 1.8 | 2.0 | 1.9 |
| North Carolina | 2.6 | 2.2 | 2.7 |
| South Carolina | 1.4 | 1.1 | 1.3 |
| Virginia | 2.4 | 2.4 | 2.4 |
| West Virginia | .8 | .7 | .8 |

(continued)

# DISTRIBUTION OF THE U.S. RESIDENT POPULATION, PERSONAL INCOME & SUPERMARKET SALES, BY STATE & REGION, 1984 (continued)

| | Population | Income | Supermarket Sales |
|---|---|---|---|
| East So. Central | 6.4% | 5.1% | 6.2% |
| Alabama | 1.7 | 1.3 | 1.6 |
| Kentucky | 1.6 | 1.3 | 1.5 |
| Mississippi | 1.1 | .8 | 1.0 |
| Tennessee | 2.0 | 1.7 | 2.1 |
| West So. Central | 11.1 | 10.4 | 11.7 |
| Arkansas | 1.0 | .8 | .8 |
| Louisiana | 1.9 | 1.6 | 2.0 |
| Oklahoma | 1.4 | 1.3 | 1.5 |
| Texas | 6.8 | 6.7 | 7.4 |
| Mountain | 5.2 | 5.0 | 6.1 |
| Arizona | 1.3 | 1.2 | 1.5 |
| Colorado | 1.3 | 1.5 | 1.7 |
| Idaho | .4 | .3 | .4 |
| Montana | .3 | .3 | .4 |
| Nevada | .4 | .4 | .5 |
| New Mexico | .6 | .5 | .7 |
| Utah | .7 | .5 | .6 |
| Wyoming | .2 | .2 | .3 |
| Pacific | 14.3 | 15.9 | 15.4 |
| Alaska | .2 | .3 | .3 |
| California | 10.8 | 12.2 | 11.6 |
| Hawaii | .4 | .5 | .4 |
| Oregon | 1.1 | 1.0 | 1.1 |
| Washington | 1.8 | 2.0 | 2.0 |

Note: State totals may not add to regional totals due to rounding.

Source: Sales and Marketing Management of Buying Power and Data Service.

# CONSUMER PRICE INDEX

(1967 = 100)

| | Annual Averages | | | | | % Change |
|---|---|---|---|---|---|---|
| | 1984 | 1983 | 1982 | 1981 | 1980 | 1984/1983 |
| All Items | 311.1 | 298.4 | 289.1 | 272.5 | 246.8 | + 4.3% |
| Food | 302.9 | 291.7 | 285.7 | 274.7 | 254.6 | + 3.8 |
| Food at home | 292.6 | 282.2 | 279.2 | 269.9 | 251.5 | + 3.7 |
| Cereals & bakery products | 305.3 | 292.5 | 283.4 | 271.0 | 246.4 | + 4.4 |
| Meats, poultry, fish & eggs | 266.6 | 261.0 | 258.2 | 256.5 | 242.2 | + 2.1 |
| Dairy products | 253.2 | 250.0 | 247.0 | 243.5 | 227.4 | + 1.3 |
| Fruits, vegetables | 317.4 | 292.2 | 291.4 | 276.3 | 246.7 | + 8.6 |
| Other foods at home | 340.0 | 352.2 | 350.4 | 308.1 | 284.5 | + 3.6 |
| Food away from home | 333.4 | 319.9 | 306.5 | 291.0 | 267.0 | + 4.2 |

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

# ADDITIONAL SUPERMARKET DATA

1. A calendar of industry events for 1986 including all major conventions and annual meetings.

2. An up-to-date directory of food associations.

# CALENDAR OF INDUSTRY EVENTS • 1986

## MARCH – CONVENTIONS AND ANNUAL MEETINGS

3-5 NAWGA, store supervision school, Plaza of the Americas, Dallas.

4,5 FMI, Management Tool Chest employe scheduling seminar, Boston.

6 FMI, cashier test battery workshop, Westin O'Hare, Chicago.

9,10 International Association of Chain Stores (CIES), international conference, Paris.

9-11 NGA, financial management conference, Point Clear, Ala.

9-12 FMI, advertising/marketing executive conference, Hotel Del Coronado, Coronado, Calif.

10,11 Western Michigan Sigma Phi Omega, food management conference, Western Michigan University, Kalamazoo.

10,11 FMI, food policy conference, Marriott, Washington.

11,12 FMI, consumer affairs council, Washington.

13 FMI, regional media conference, Cincinnati.

16-19 NAWGA, annual convention and exposition, Convention Center, New Orleans.

16-19 NGA, business computer/scanning conference, Marriott Marquis, Atlanta.

16-21 FMI, professional management program, Hillsdale College, Hillsdale, Mich.

17,18 NGA/Ohio State University, supermarket management conference, Hyatt Regency Columbus, Columbus, Ohio

17,18 North Carolina Food Dealers Association, annual management seminar, School of Business, University of North Carolina Chapel Hill.

17-19 NAWGA, buying/merchandising seminar, Intercontinental Hotel, New Orleans.

19 Eastern Frosted Foods Association, frozen food brunch, stadium club, Giants Stadium, Meadowlands, N.J.

23-26 American Meat Institute/FMI, meat marketing conference, Fairmont Hotel, Dallas.

25-26 FMI, Management Tool Chest gross-profit-control (retail accounting) seminar, Columbus, Ohio.

## APRIL – CONVENTIONS AND ANNUAL MEETINGS

2-4 NGA, data processing conference, Kansas City, Kan.

2-4 Produce Marketing Association, food-service seminar and tour, Mandalay Beach Resort, Oxnard, Calif.

6-8 FMI, warehouse markets conference Registry Hotel, Minneapolis.

6-9 Electronic Funds Transfer Association, EFTA convention and exposition, Fairmont Hotel, New Orleans.

6-10 National Housewares Manufacturers Association, international housewares exposition, McCormick Place, McCormick Place West, Chicago.

7-9 NGA, public affairs conference, Hyatt Capitol Hill, Washington.

9 FMI, cashier test battery workshop, Boston.

11-16 Retail Bakers of America, supermarket bakery conference and convention-exhibition, Hyatt Regency and MECCA Convention Hall, Milwaukee.

13-15 NGA, warehouse/transportation conference, Dallas.

13-16 FMI, training development forum, Hyatt Regency, Dallas.

15-17 NAWGA, advertising and sales management seminars, Hyatt Regency, Oakland.

23-25 NGA, buyer-seller conference, Westin O'Hare, Chicago.

26-28 Tennessee Retail Grocers Association, annual convention, Opryland Hotel, Nashville.

27-29 NGA, advertising conference, Westin O'Hare, Chicago.

27-29 North Carolina Food Dealers Association, president's conference, Grove Park Inn, Asheville.

28-30 NAWGA, supervision II, Stouffers Concourse, St. Louis.

## MAY – CONVENTIONS AND ANUAL MEETINGS

2-4 IGA, 60th anniversary convention McCormick Center, Chicago.

4-7 FMI, supermarket industry convention and educational exposition, McCormick Center, Chicago.

17-19 Retail Grocers Association of Arizona, annual convention, Civic Plaza, Phoenix.

18-20 NGA, data processing conference, Kansas City Marriott, Kansas City, Mo.

18-21 FMI, financial executives conference, Four Seasons, Toronto.

19-21 NAWGA, delivery/transportation seminar, Inn on the Park, Houston.

21-23 NAWGA, retail accounting seminar, Hyatt Regency, Nashville.

## JUNE – CONVENTIONS AND ANNUAL MEETINGS

1-6 National Food Brokers Association, management conference, Broadmoor, Colorado Springs.

7-10 Food Retailers Association of South Carolina, annual convention, Convention Center, Myrtle Beach.

8-10 FMI, converence on retail automation, Marriott Long Wharf, Boston.

8-10 Texas Retail Grocers Association, annual convention, Tarrant County Convention Center, Ft. Worth.

8-10 Intl. Dairy/Deli Association, seminar/exposition, Las Vegas Hilton, Las Vegas.

8-11 CIES, annual executive conference, Hofburg Palace, Vienna.

8-11 NGA, data processing conference, Kansas City Marriott, Kansas City, Mo.

8-11 NGA, financial management conference, Fours Seasons Olympic Hotel, Seattle.

9-11 NAWGA, supervision I, Twin Bridges Marriott, Washington, D.C.

11-13 NAWGA, IFDA warehousing and delivery seminar, Constellation, Toronto.

15-17 FMI, legal conference, San Francisco.

15-17 Pennsylvania Grocers Association/Pennsylvania Food Merchants Association, annual convention, Valley Forge Convention and Exhibit Center, King of Prussia.

15-20 FMI, professional management program, Hillsdale College, Hillsdale, Mich.

## JULY – CONVENTIONS AND ANNUAL MEETINGS

8-10 FMI, regional operator conference, La Crosse, Wis.

13-16 PMA/FMI/NAWGA/United Fresh Fruit and Vegetable Association, annual produce conference, Red Lion Inn, Bakersfield, Calif.

14-16 NAWGA, labor briefing, Radisson, Alexandria, Va.

15-17 FMI, regional operator conference, Hartford, Conn.

20-22 NGA, store and engineering conference, Philadelphia.

20-23 NGA, convention and exhibition, Civic Center, Philadelphia.

21-23 NAWGA, cash and carry seminar, Hyatt Regency, Baltimore.

24 FMI regional media conference, Minneapolis-St. Paul.

## AUGUST – CONVENTIONS AND ANNUAL MEETINGS

3-6 American Association of Meat Processors, convention and exhibition, MGM Grand Hotel, Reno.

5-7 National Food distributors Association, annual convention, Hyatt Regency, Chicago.

11,12 NAWGA, workers compensation seminar, Sheraton Embassy, Kansas City, Mo.

17-19 North Carolina Food Dealers Association, annual convention and food buyers' show, Convention Center, Charlotte.

17-22 FMI, professional management program, Hillsdale, Mich.

24-26 FMI, industrywide conference on scanning, Chicago.

## SEPTEMBER – CONVENTIONS AND ANNUAL MEETINGS

3-5 NAWGA, store development seminar, Stouffers, St. Louis.

5-7 Vermont Retail Grocers Association, annual convention, Radisson, Burlington.

7-9 Ohio Grocers Association, annual convention, Hyatt Regency, Columbus.

7-10 Michigan Food Dealers Association, convention and trade show, Grand Tranverse Resort, Tranverse City, Mich.

9,10 FMI, Management Tool Chest employe scheduling seminar, Houston.

14-16 Indiana Retail Grocers Association, annual convention, Indianapolis Convention Center.

14-16 Minnesota Grocers Association, Convention and Trade Show, Civic Center, St. Paul.

14-16 NGA, legal conference, Washington.

14-17 NGA, meat conference, Williamsburg, Va.

14-17 FMI, information systems conference, Amelia Island, Fla.

15-17 NAWGA, meat operations seminar, Vanderbilt Plaza, Nashville.

15-17 NAWGA, food-service meat marketing seminar, Vanderbilt Plaza, Nashville.

15-17 NAWGA, advance food-service buyers seminar, Tysons Marriott, Washington.

17-20 FMI, consumer affairs council, Denver.

21-24 Food Distribution Research Society annual meeting, Clarion Hotel, Denver.

22,23 Utah Retail Grocers Association, annual convention, Marriott, Salt Lake City.

22-24 NGA, human resources conference, St. Louis.

22-26 FMI, store location seminar/real estate, Washington.

23-25 FMI, regional operator conference, Oakland.

24-26 FMI, EFT conference, Chicago.

26-28 Kentucky Grocers Association, annual convention, Lexington Center, Lexington, Ky.

26-28 Oklahoma Retail Grocers Association, annual convention, Marriott, Oklahoma City.

28-30 Wisconsin Grocers Association, annual convention, Hyatt Regency, Milwaukee.

28-Oct.1 NGA, meat conference, Marriott Marquis, Atlanta.

28-Oct.1 FMI, energy conference, Monterey, Calif.

28-Oct.1 FMI, human resources conference, Tucson.

28-Oct.1 NAWGA, midyear executive conference, Broadmoor Hotel, Colorado Springs.

30-Oct.1 FMI, Management Tool Chest gross-profit-control (retail accounting) seminar, Atlanta.

## OCTOBER - CONVENTIONS AND ANNUAL MEETINGS

3-6 California Grocers Association, annual convention, MGM Grand, Reno.

5-7 National nonfood exposition and conference, Jacob K. Javits Convention Center, New York.

5-8 FMI, regional operators conference, Denver.

6-8 NAWGA, store supervision school, Keybridge Marriott, Washington.

6-8 NGA, retailer-owned legal conference, Hyatt Capital Hill, Washington.

10-12 West Virginia Association of Retail Grocers, convention and trade show, Charleston Civic Center, Marriott, Charleston, W.Va.

10-14 Virginia Food Dealers Association, annual convention, Omni, Norfolk, Va.

15-18 National Frozen Food Association, convention and exposition, MGM Grand, Las Vegas.

18-22 PMA, convention and exposition, Convention Center, San Antonio.

19-24 FMI, professional management seminar, Hillsdale, Mich.

20-22 NAWGA, supervision III, Keybridge Marriott, Washington.

26-28 Retail Grocers Association of Florida, annual meeting, Curtis Hixon, Tampa.

26-28 FMI, risk management conference, San Antonio.

28-30 FMI, regional operators conference, Dallas.

## NOVEMBER - CONVENTIONS AND ANNUAL MEETINGS

2-5 National Association of Convenience Stores, convention, Sheraton, New Orleans.

2-5 NAWGA, computer conference and exposition, Market Center, Atlanta.

16-19 PLMA, convention, O'Hare Exposition Center, Chicago.

20 FMI, regional media conference, San Francisco.

## DECEMBER - CONVENTIONS AND ANNUAL MEETINGS

3-5 NAWGA, food service sales and marketing, N.W. Hilton, Atlanta.

6-11 National Food Brokers Association, annual convention, San Francisco.

# DIRECTORY OF FOOD ASSOCIATIONS

American Bakers Association
1111 14th Street, N.W.
Washington, D.C. 20005 (202)296-5800

American Beekeeping Federation
13637 N.W., 39th Avenue
Gainesville, Florida 32606 (904)375-0012

American Butter Institute
699 Prince Street
Box 20047
Alexandra, Virginia 22320

American Dairy Association, Inc.
6300 N. River Road
Rosemont, Illinois 60018 (312)696-1880

The American Dietetic Association
430 North Michigan Avenue
Chicago, Illinois 60606 (312)280-5000

American Dry Milk Institute, Inc.
130 North Franklin Street
Chicago, Illinois 60606 (312)782-4888

American Frozen Food Institute
1700 Old Meadow Road
McLean, Virginia 22102 (703)821-0770

American Meat Institute
1700 North Moore St.
Arlington, Virginia 22209 (703)841-2400

American Poultry Association
Route 4, Box 351
Troy, New York 12180 (518)286-1818

American School Food Service Association
4101 East Iliff Ave.
Denver, Colorado 80222 (800)525-8575

American Seafood Retailers Association
67 River Road
Cos Cob, Conn. 06807 (203)661-2959

American Shrimp Processors Association
Box 50774
New Orleans, Louisiana 70150 (504)368-1571

American Society for Hospital Food Service
Administrators
840 North Lake Shore Drive
Chicago, Illinois 60611 (312)280-6416

American Soybean Association
Box 27300
777 Craig Road
St. Louis, MO 6314-1700 (314)432-1600

American Spice Trade Association
P.O. Box 1267
Englewood Cliffs, N.J. 07632 (201)568-2163

The Association for Dressings & Sauces
5775 Peachtree-Dunwoody Rd. Suite 500D
Atlanta, Georgia 30342 (404)252-3663

Barley and Malt Institute
Box 08432
Milwaukee, Wisconsin 53208 (414)445-9330

Biscuit and Cracker Distributors Association
111 E. Wacker Drive
Chicago, Illinois 60601 (312)644-6610

California Dried Fruit Export
Association
P.O. Box 270A, 303 Brokaw Road
Santa Clara, California 95052 (408)727-9302

Calorie Control Council
5775 Peachtree-Dunwood Rd., Suite 500D
Atlanta, Georigia 30342 (404)252-3663

Can Manufacturers Institute
1625 Massachusetts Ave., N.W.
Washington, D.C. 20036 (202)232-4677

Canned and Cooked Meat Importers
Association
1700 N. Moore St., Suite 1600
Arlington, Virginia 22209 (703)841-2400

Certified Milk Producers Association
of America
Alta Dena Dairy, P.O. Box 388
17637 E. Valley Blvd.
City of Industry, CA 91747 (818)964-6401

Cheese Importers Association of America
460 Park Avenue
New York, New York 10022 (212)753-7500

Coffee, Sugar and Cocoa Exchange
4 World Trade Center, S.E.
New York, New York 10048 (212)938-2800

Council of Food Processors Association
Executives
1401 New York Ave., N.W. Suite 400
Washington, D.C. 20005 (202)639-5900

Fibre Box Association
5725 North East River Road
Chicago, Illinois 60631 (312)693-9600

Food Industry Association Executives
6909 Northeast Drive
Austin, Texas 78723 (512)451-0405

Food Marketing Institute
1750 "K" Street, N.W., Suite 700
Washington, D.c. 20006 (202)452-8444

Food Merchandisers of America
Box 1899
Beaufort, S.C. 29901-1899 (803)524-5588

Food Processing Machinery & Supplies
Association
1828 "L" Street, N.W. Suite 700
Washington, D.C. 20036 (202)833-1790

Fresh Garlic Association
Box 2151
Gilroy, California 95020

Frozen Potato Products Institute
1700 Old Meadow Road, Suite 100
McLean, Virginia 22102 (703)821-0770

Gelatin Manufacturer's Institute
of America
Room 507
516 Fifth Avenue
New York, New York 10036 (212)575-1234

General Merchandise Distributors Council
1275 Lake Plaza Drive
Colorado Springs, Colorado 80906
(303)576-4260

Grocery Manufacturers of America
1010 Wisconsin Avenue, N.W., Suite 800
Washington, D.C. 20007 (202)337-9400

International Apple Institute
6707 Old Dominion Dr., Suite 210
Box 1137
McLean, Virginia 22101 (703)442-8850

International Association of Ice Cream
Manufacturers
888 16th Street, N.W.
Washington, D.C. 20006 (202)296-4250

International Council of Shopping Centers
665 Fifth Avenue
New York, New York 10022 (212)421-8181

International Frozen Food Association
Suite 100
1700 Old Meadow Road
McLean, Virginia 22102 (703)821-0770

International Jelly and Preserve
Association
5775 Peachtree-Dunwoody Road, Suite 500D
Atlanta, Georgia 30342 (404)252-3663

Leafy Greens Council
503 South Oak Park Avenue
Oak Park, Illinois 60304

Milk Industry Foundation
888 16th Street, N.W.
Washington, D.C. 20006 (202)296-4250

Miller's National Federation
600 Maryland Avenue S.W., Suite 305W
Washington, D.C. 20024 (202)484-2200

National American Wholesale Grocers'
Association
201 Park Washington Court
Falls Church, Virginia 22046 (703)532-9400

National Association for the Specialty
Food Trade, Inc.
215 Park Ave. South, #1606
New York, N.Y. 10003 (212)505-1770

National Association of Convenience
Stores
5201 Leesburg Pike, Suite 809
Falls Church, Virginia 22041 (703)578-1800

National Association of Margarine
Manufacturers
1625 Eye Street, N.W., Suite 1024A
Washington, D.C. 20006 (202)785-3232

National Association of Meat Purveyors
8365-B Greensboro Drive
McLean, Virginia 22102 (703)827-5754

National Association of Service
Merchandising
221 North LaSalle Street, Suite 863
Chicago, Illinois 60601 (312)368-1278

National Association of Specialty Food
and Confection Brokers
6501 Poco Court
Fort Worth, Texas 76137 (817)292-8495

National Association of Tobacco
Distributors
1199 N. Fairfax St., Suite 701
Alexandra, Virginia 22314 (703)683-8336

National Beer Wholsalers' Association
5205 Leesburg Pike, Suite 505
Falls Church, Virginia 22041 (703)578-4300

National Broiler Council
1155 15th Street, N.W.
Washington, D.C. 20005 (202)296-2622

National Candy Wholesalers Association
1120 Vermont Ave., N.W.
Washington, D.C. 20005 (202)463-2124

National Cheese Institute
699 Pine Street, Box 20047
Alexandra, Virginia 22320 (703)549-2230

National Coffee Association of the U.S.A.
120 Wall Street
New York, New York 10005 (212)344-5596

National Confectioners' Assoc. of the U.S.
7900 Westpark Drive, Suite 514
McLean, Virginia 22102 (703)790-5750

National Corn Growers Association
1015 15th Street, N.W. #201
Washington, D.C. 20005 (202)371-1450

National Dairy Council
6300 N. River Road
Rosemont, Illinois 60018 (312)696-1020

National Fisheries Institute
2000 "M" Street, N.W., Suite 580
Washington, D.C. 20036 (202)296-2080

National Food Brokers Association
1010 Massachusetts Ave., N.W.
Washington, D.C. 20001 (202)789-2844

National Food Distributors Association
111 East Wacker Drive
Chicago, Illinois 60601 (312)644-6610

National Food Processors Association
1401 New York Ave., N.W.
Washington, D.C. 20005 (202)639-5900

National Frozen Foods Association
P.O. Box 398
Hershey, Pennsylvania 17033 (717)534-1601

National Frozen Pizza Institute
1700 Old Meadow Road, Suite 100
McLean, Virginia 22101 (703)821-0770

National Grocers Association
1825 Samuel Morse Drive
Reston, Virginia 22090 (703) 437-5300

National Honey Packers and Dealers
Association
Box 8
Edgewater, Florida 32032 (904)428-9027

National Independent Poultry and Food
Distributors Association
2445 Terry Road
Jackson, Mississippi 39204 (601)354-0355

National Live Stock & Meat Board
444 N. Michigan Avenue
Chicago, Illinois 60611 (312)467-5520

National Meat Canners Association
P.O. Box 3556
Washington, D.C. 20007 (703)841-2424

National Onion Association
5701 East Evans Avenue, Suite 26
Denver, Colorado 80222 (303)756-1581

National Paperbox and Packaging Association
231 Kings Highway East
Haddonfield, New Jersey 08033 (609)429-7377

National Pasta Association
1901 N. Ft. Myer Drive
Arlington, Virginia 22209 (703)841-0818

National Peanut Council
1000 16th Street, N.W., Suite 700
Washington, D.C. 20036 (202)775-0450

National Peach Council
P.O. Box 1085
Martinsburg, W. Virginia 25401 (304)267-6024

National Potato Council
4685 Peoria Stree, Suite 101
Denver, Colorado 80239 (303)373-5639

National Prepared Frozen Food
Association
99 W. Hawthorne Avenue
Valley Stream, N.Y. 11580 (516)825-3000

National Red Cherry Institute
678 Front Street, N.W., Suite 140
Grand Rapids, Michigan 49504 (616)454-6196

National Soft Drink Association
1101 16th Street, N.W.,
Washington, D.C. 20036 (202)463-6732

National Sugar Brokers Association, Inc.
Suite 4517, One World Trade Center
New York, New York 10048 (212)938-0990

National Turkey Federation
11319 Sunset Hills Road
Reston, Virginia 22090 (703)435-7206

Packaging Institute U.S.A.
20 East 46th Street
New York, New York 10017 (212)687-8874

Paperboard Packaging Council
1101 Vermont Ave., N.W., Suite 411
Washington, D.C. 20005 (202)289-4100

Peanut Butter And Nut Processors
 Association
9005 Congressional Court
Potomac, Maryland 20854 (301)365-4080

Pet Food Institute
1101 Connecticut Avenue, N.W., Suite 700
Washington, D.C. 20036 (202)857-1120

Pickle Packers International
Box 606
St. Charles, Illinois 60174 (312)584-8950

The Popcorn Institute
111 East Wacker Drive
Chicago, Illinois 60601 (312)644-6610

The Potato Association of America
University of Wisconsin
Hancock, Wisconsin 54913 (715)249-5712

Potato Chip/Snack Food Association
1711 King St.
Alexandria, Virginia 22314 (703)836-4500

Processed Apples Institute, Inc.
5775 Peachtree-Dunwoody Road, Suite 500D
Atlanta, Georgia 30342 (404)252-3663

Produce Marketing Assocation
700 Barksdale Road
Newark, Delaware 19711 (302)738-7100

Rice Council of America
Box 740123
Houston, Texas 77274 (713)270-6699

The Rice Millers Association
1235 Jefferson Davis Highway
Arlington, Virginia 22202 (703)920-1281

Shellfish Institute of North America
2000 "M" Street, N.W., Suite 580
Washington, D.C. 20036 (202)296-5170

The Sugar Association, Inc.
1511 "K" Street, N.W.
Washington, D.C. 20005 (202)628-0189

Tuna Research Foundation
Suite 910, 1101 17th Street, N.W.
Washington, D.C. 20036 (202)296-4360

United Food and Commercial Workers
 International Union
1775 "K" Street, N.W.
Washington, D.C. 20006 (202)223-3111

United Fresh Fruit and Vegetable Association
North Washington and Madison
Alexandria, Virginia 22314 (703)836-3410

Vanilla Bean Assocation of America
47-22 Pearson Place
Long Island City, New York 11101 (718)392-7800

The Vinegar Institute
5775 Peachtreee-Dunwoody Road, Suite 500D
Atlanta, Georgia 30342 (404)252-3663

Wheat Industry Council
1333 H. Street, N.W., Sutie 1200
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The Wine Institute
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San Francisco, California 94108 (415)986-0878

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